



THE UNIVERSITY
of **NORTH CAROLINA**
at **CHAPEL HILL**

2020 EQUAL EMPLOYMENT OPPORTUNITY PLAN

State Plan

For SHRA Employees

March 1, 2020 – February 28, 2021

UNC-CHAPEL HILL
Equal Opportunity and Compliance Office
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<http://eoc.unc.edu>

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- Report # 1 – SHRA Job Group Analysis
- Report # 2 - SHRA Incumbency v. Availability Analysis
- Report # 3 - SHRA Placement Goals
- Report # 4 – SHRA Workforce Analysis

SHRA EEO PLAN ATTACHMENTS

- #1. Occupational Classifications – UNC System Office Job Group Classifications and Crosswalk
- #2. Race and Ethnicity Descriptions
- #3. Statistical Evaluation (Employment Activity)
- #4. EEO Quantitative Analysis Form
- #5. Job Openings Estimate Form
- #6. OSHR Reduction in Force Policy

II. Chancellor’s Certification Statement

Equal Employment Opportunity/Affirmative Action Plan

Certification Statement

This certifies that the attached Equal Employment Opportunity/Affirmative Action Plan represents the University of North Carolina at Chapel Hill’s commitment to provide equal employment opportunities to all applicants and employees. I attest that the University of North Carolina at Chapel Hill follows the North Carolina Equal Employment Opportunity Policy along with all applicable federal and state laws, including current executive orders governing equal employment opportunities.

University Chancellor Signature

Date

EEO/AA Officer Signature

Date

III. State of North Carolina Equal Employment Opportunity Policy

Office of State Human Resources

Effective Date: April 2019

Policy

Coverage

Veterans

Office of State Human Resources Responsibilities

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Definitions

Policy

The State of North Carolina provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination, harassment or retaliation based on race, religion, color, national origin, ethnicity, sex, pregnancy, gender identity or expression, sexual orientation, age (40 or older), political affiliation, National Guard or veteran status, genetic information, or disability. The State also recognizes that an effective and efficient government requires the talents, skills and abilities of all qualified and available individuals, and seeks opportunities to promote diversity and inclusion at all occupational levels of State government's workforce through equal employment opportunity (EEO) workforce planning initiatives.

The State is committed to ensuring the administration and implementation of all human resources policies, practices and programs are fair and equitable. State agencies, departments and universities shall be accountable for administering all aspects of employment, including hiring, dismissal, compensation, job assignment, classification, promotion, reduction in-force, training, benefits and any other terms and conditions of employment in accordance with federal and State EEO laws and policies.

Employees shall not engage in harassing conduct, and if harassing conduct does occur, it should be reported. Managers and supervisors maintain a critical role and responsibility in preventing and eliminating harassing conduct in our workplace. See the Unlawful Workplace Harassment policy of the State Human Resources Manual for provisions related to unlawful harassment, including sexual harassment.

Acts of retaliation against an employee who engages in protected activity or the exercise of any appeal or grievance right provided by law will not be tolerated in our workplace.

Coverage

Individuals protected by provisions of this policy are:

1. current employees;
2. former employees; and
3. job applicants

Veterans

Job discrimination of veterans shall be prohibited, and affirmative action shall be undertaken to employ and advance in employment eligible veterans in accordance with Article 13 of G.S. 126 and G.S. 128-15.

See the Veteran's Preference policy in the State Human Resources Manual for provisions related to veteran's preference including the employment and advancement of protected veterans.

Office of State Human Resources Responsibilities

The Office of State Human Resources (OSHR) shall:

1. establish the EEO Plan Requirements and Program Guidelines in accordance with federal and state laws to be followed by all agencies, departments and universities, to ensure commitment to and accountability for equal employment opportunity throughout State government;
2. review, approve and monitor all EEO plans and updates;
3. provide services of EEO technical assistance, training, oversight, monitoring, evaluation, support programs, and reporting to ensure that State government's work force is diverse at all occupational levels;
4. develop and promote EEO programs and best practices to encourage consistent and fair treatment of all State employees; and
5. meet with agency heads, department heads, and university chancellors, Human Resources Directors and EEO Directors/Officers annually to discuss the progress made toward reaching program goals.

Agency, Department and University Responsibilities:

Each Agency Head, Department Head and University Chancellor shall:

1. adhere to the policies and programs that have been adopted by the State Human Resources Commission and approved by the Governor;
2. ensure the agency, department or university's commitment to EEO is clearly communicated to all employees;
3. ensure that Human Resources policies and employment practices are implemented consistently and fairly;

4. designate an EEO Officer/Director who has access to the agency head, department head or university chancellor to be responsible for the operation and implementation of the EEO Plan;
5. provide the necessary resources to ensure the successful implementation of the EEO Program;
6. ensure each manager and supervisor has, as a part of his or her performance plan, the responsibility to comply with EEO laws and policies, and assist in achieving EEO goals established by the agency, department or university;
7. ensure the EEO Plan is designed in accordance with the EEO Plan Requirements and Program Guidelines as specified by the Office of State Human Resources;
8. ensure the EEO Plan is submitted by March 1st of each year to the Office of State Human Resources for review and approval as required by G.S. 126-19;
9. ensure all employees are made aware of the EEO policy including the Unlawful Workplace Harassment Policy found in the State Human Resources Manual;
10. develop strategies to prevent unlawful workplace harassment and retaliation in the workplace;
11. ensure required employee notices describing Federal laws prohibiting job discrimination are posted in work locations where notices to applicants and employees are customarily posted and easily accessible to applicants and employees with disabilities;
12. maintain records of all complaints and grievances alleging discriminatory practices; and
13. ensure all newly hired, promoted, or appointed supervisors and managers complete required EEO training in accordance with G.S. 126-16.1. See the Equal Employment Opportunity Diversity Fundamentals policy located in the State Human.

Complaint Process

An individual covered by this policy who is alleging unlawful discrimination, harassment or retaliation may file a complaint following the process outlined in the Employee Grievance Policy located in the State Human Resources Manual. For the purpose of this policy, political affiliation is not a protected classification under federal EEO law but may be grieved pursuant to G.S. 126-34.02 as a contested case after completion of the agency grievance procedure

IV. University Overview, Purpose and Mission

The University of North Carolina at Chapel Hill, the nation's first public university, serves North Carolina, the United States, and the world through teaching, research, and public service. The University embraces an unwavering commitment to excellence as one of the world's great research universities. Situated in the beautiful college town of Chapel Hill, North Carolina, UNC has earned a reputation as one of the best universities in the world. Carolina prides itself on a strong, diverse student body, academic opportunities not found anywhere else, and a value unmatched by any public university in the nation.

Now in its third century, the University offers 74 bachelor's, 104 master's, 65 doctorate and seven professional degree programs through 14 schools and the College of Arts and Sciences. More than 30,000 undergraduate, graduate and professional students learn from a faculty of 3,887. Every day, faculty, staff and students shape their teaching, research and public service to meet North Carolina's most pressing needs in all 100 counties. Carolina's 335,000 alumni live in all 50 states and D.C. and more than 161 countries.

The mission is to serve as a center for research, scholarship, and creativity and to teach a diverse community of undergraduate, graduate, and professional students to become the next generation of leaders. Through the efforts of exceptional faculty and staff, and with generous support from North Carolina's citizens, the University invests its knowledge and resources to enhance access to learning and to foster the success and prosperity of each rising generation. The University also extends knowledge-based services and other resources of the University to the citizens of North Carolina and their institutions to enhance the quality of life for all people in the State.

V. University Policy Statement on Non-Discrimination

The University is committed to providing an inclusive and welcoming environment and to ensuring that educational and employment decisions are based on individuals' abilities and qualifications. Consistent with these principles and applicable laws, it is therefore the University's policy not to discriminate on the basis of age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status as consistent with the University's Policy on Prohibited Discrimination, Harassment and Related Misconduct. No person, on the basis of protected status, shall be excluded from participation in, be denied the benefits of, or be subjected to unlawful discrimination, harassment, or retaliation under any University program or activity, including with respect to employment terms and conditions. Such a policy ensures that only relevant factors are considered and that equitable and consistent standards of conduct and performance are applied.

Procedures

Any University unit that publishes materials that contain the University's Policy Statement on Non-Discrimination should include all bases of non-discrimination (age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, or veteran status) in that material, as follows:

For educational materials:

The University of North Carolina at Chapel Hill is committed to equality of educational opportunity. The University does not discriminate in offering access to its educational programs and activities on the basis of age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, or veteran status. The Equal Opportunity and Compliance Office (214 W. Cameron Ave. Chapel Hill, NC 27599 or (919) 966-3576) has been designated to handle inquiries regarding the University's non-discrimination policies.

For employment materials:

The University is an equal opportunity, affirmative action employer and welcomes all to apply without regard to age, color, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, or sexual orientation. We also encourage protected veterans and individuals with disabilities to apply.

Related Statutes and Policies

- Title II of the Genetic Information Nondiscrimination Act of 2008
- Title IV of the Civil Rights Act of 1964
- Title VI of the Civil Rights Act of 1964
- Title VII of the Civil Rights Act of 1964
- Title IX of the Education Amendments Act of 1972
- Age Discrimination Act of 1975
- Age Discrimination in Employment Act of 1967
- Rehabilitation Act of 1973
- Americans with Disabilities Act of 1990
- Vietnam Era Veterans Readjustment Act of 1974
- Equal Pay Act of 1963
- Executive Order 11246
- Executive Order 13672
- Policy on Prohibited Discrimination, Harassment and Related Misconduct available at (<https://unc.policystat.com/policy/4514917/latest/>)
- Policy on Non-Discrimination for Student Organizations available at (<https://unc.policystat.com/policy/5429623/latest/>)
- Policy on Non-Discrimination for Program Participants available at (<https://unc.policystat.com/policy/4469242/latest/>)
- Policy on ADA Reasonable Accommodations for Employees, Applicants, and Visitors available at <https://unc.policystat.com/policy/4468010/latest/>)

- SHRA Grievance Policy available at
(<https://unc.policystat.com/policy/5230165/latest/>)
- EHRA Non-Faculty Employees Dispute Resolution & Grievances available at
(<https://unc.policystat.com/policy/4483428/latest/>)
- Faculty Grievance Procedures available at
(<https://facultygov.unc.edu/committees/elected-committees/faculty-grievance-committee/procedures-for-the-faculty-grievance-committee/>)
- Post-Doctoral Scholar Policy available at
(<https://unc.policystat.com/policy/4492399/latest/>)

Contacts

Any inquiries regarding the University's non-discrimination policies should be brought to the attention of one of the following administrators:

Discrimination in employment or educational programs and activities

Becci Menghini

Vice Chancellor, Human Resources and Equal Opportunity & Compliance
200 E. Cameron Ave.
Chapel Hill, NC 27514

Brandon Washington

Interim Associate Vice Chancellor, Equal Opportunity and Compliance
214 W. Cameron Ave.
Chapel Hill, NC 27599
919-966-3576

Sex discrimination in educational programs and activities

Adrienne Allison

Director of Title IX Compliance/ Title IX Coordinator
214 W. Cameron Ave.
Chapel Hill, NC 27599
919-445-1577

The University's Counseling and Psychological Services (919-966-3658) and the Ombuds Office (919-843-8204) are available to provide confidential assistance to students. The University's Ombuds Office (919-843-8204) is also available to provide confidential assistance to faculty and staff. Employees may also seek help through the Employee Assistance Program (877-314-5841). Inquiries concerning the application of non-discrimination laws may be referred to the University officials listed above or to the Office for Civil Rights, United States Department of Education. For further information about OCR and its jurisdiction, visit <https://www2.ed.gov/about/offices/list/ocr/index.html>

or call 1-800-421-3481. If you need assistance in reviewing materials or have additional questions about this Policy, please contact the Equal Opportunity and Compliance Office (919-966-3576).

Document History

Effective Date: October 2005

Last Revised Date: February 2018

VI. University EEO/Diversity & Inclusion Achievements

The Equal Opportunity and Compliance Office and Office of Human Resources are committed to making sure that employment decisions are based on skill and ability, and that qualified applicants and employees have equal opportunities for recruitment, selection, and advancement at Carolina. The office oversees these responsibilities through its development and management of the EEO Plan; implementation of EEO Data Forms process for the collection of required disability, ethnicity/race, gender and veteran status information; management of the recruitment waivers process; implementation and management of the search committee training; and facilitation of the on-site Equal Employment Opportunity and Diversity Fundamentals (EEODF) training.

Campus units engaged in various strategies to advance and achieve the University's diversity goals, and to ensure that all in our campus community feel welcomed, included and supported. Several ideas and recommendations served as a "best practices" template for schools, divisions and departments.

Successful Office of Federal Compliance Programs (OFCCP) Review

On December 22, 2017 the University was notified that it was randomly selected by the OFCCP for a compliance review.¹ The OFCCP is an Office within the U.S. Department of Labor charged with ensuring compliance with federal civil rights laws that apply to federal contractors (such as the University). This review included the following: 1. a thorough analysis of the University's State and Federal EO Plans for the last three years. 2. a review of the University's policies/procedures related to equitable hiring, 3. a review of the University's policies/procedures related to preventing and eliminating all forms of discrimination and harassment, and 4. a review of the way the University manages accommodations for individuals with disabilities.

¹ The OFCCP's Mission Statement is "At the Office of Federal Contract Compliance Programs (OFCCP), we protect workers, promote diversity and enforce the law. OFCCP holds those who do business with the federal government (contractors and subcontractors) responsible for complying with the legal requirement to take affirmative action and not discriminate on the basis of race, color, sex, sexual orientation, gender identity, religion, national origin, disability, or status as a protected veteran. In addition, contractors and subcontractors are prohibited from discharging or otherwise discriminating against applicants or employees who inquire about, discuss or disclose their compensation or that of others, subject to certain limitations." <https://www.dol.gov/ofccp/aboutof.html>

On December 20, 2018, the University received a letter from the OFFCP indicating that it had concluded its review and found no violations. The University is not surprised by the outcome of the OFCCP as there are extensive efforts to ensure that the University's policies, practices and procedures go far past minimal compliance requirements. However, the University is particularly proud of the expediency in which such a determination was made. Based on the recordkeeping, policies, practices, and training that is maintained by the University, the OFCCP was able to complete a review of 3 years' worth of EO data in less than 1 year. This equates to a review of over 45,000 employees (over a 3 year span). It should be noted that reviews of this magnitude often take multiple years to complete.

Increased Efforts for Self-Identification

The University continued its efforts to increase the self-identification of individuals with disabilities by providing training to employees with current and clear information regarding the definition of an individual with a disability, and its relation to self-identification, specifically the University's need, use, and confidentiality of the data. These efforts have helped to increase the number of SHRA employees that have self-identified as having a disability.

The University also launched the "Count Me In" Campaign during the April 2019 Empowering Carolina event¹. This campaign was developed to promote the voluntary self-identification of individuals with disabilities. The University has made significant progress towards increasing the total number of employees that have self-identified. During the applicable period, the University reached its highest disability self-identification rate of SHRA employees, 6.64%.

Digital Accessibility

During the review period the University furthered its commitment to inclusion by investing hundreds of thousands of dollars and thousands of people hours into strengthening the University's web and overall digital accessibility. Specifically, the University formed an interdisciplinary Digital Accessibility Advisory Team (DAAT) that meets weekly each other and periodically with an external vendor to prioritize and organize various tasks related to digital accessibility. With the support of the University's executive leadership, the DAAT has:

- Hosted dozens of listening sessions on campus with various constituencies to ensure that all areas of digital accessibility are addressed;
- Published and implemented a University-wide policy to ensure digital accessibility;
- Has staffed the entire Digital Accessibility Office, including the Digital Compliance leader and support staff;

¹ Empowering Carolina is a series of campus programs that raise awareness around issues of access and inclusion with regard to individuals with disabilities.

- Worked with an external vendor to audit existing and new websites to ensure compliance; and implement safeguards to ensure third-party products and services meet the prescribed legal standards;
- Created a digitalaccess.unc.edu link which provided resources and a reporting mechanism for digital consumers to report any accessibility issues.
- Worked as a liaison with an external vendor to provide training to over 100 University digital content loaders.
- Developed and facilitated multiple digital accessibility training sessions for liaisons and the campus community:
- Developed and distributed the Digital Accessibility Policy and Standard on Accessible Digital Content, Resources, and Technology

University Training

The University has and continues to prioritize educating its employees and supervisors on the University’s Policy Prohibiting Discrimination, Harassment and Related Misconduct (Policy).¹ We are thrilled to report that during the applicable reporting period the University’s Equal Opportunity and Compliance Office (EOC) conducted 113 in person training sessions which included over 3,429 employees. These sessions included trainings on the following topics: Reasonable Accommodations under the ADA, Harassment and Discrimination Prevention and Reasonable Accommodations based on Religion, Harassment and Discrimination Prevention and Awareness training on (Sex/Gender, Race, National Origin, Color, and Disability), Harassment and Discrimination Prevention and Awareness Overviews, Responsible Employee Reporting, customized Haven Training², Equal Employment Opportunity & Diversity Fundamentals, Search Committee Training, Unconscious Bias, Equal Opportunity and Compliance 101, Title IX Awareness and Reporting, HR Onboarding, EO Plan overviews, Increasing Self-Identification, Bystander Intervention, and various other customized training for individual departments.

During the Plan year, 246 employees completed EEODF at UNC’s campus. The on-campus EEODF is facilitated by five state-certified adjunct trainers that are members of the Equal Opportunity and Compliance Office.

Religious Accommodations Policy

During the 2019 Plan year the University implemented the campus-wide Religious Accommodations Policy. As the University is committed to providing a welcoming and inclusive environment that is respectful of the Religious Beliefs and Practices of all members of the University community. The University’s Religious Accommodation Policy ensures that the University will make good faith efforts to provide reasonable Religious Accommodations to individuals covered by the Policy whose sincerely held Religious Beliefs and Practices conflict with a University policy, procedure, or other academic or

¹ <https://unc.policystat.com/policy/7019871/latest/>

² <https://womenscenter.unc.edu/programs/haven-training/>

employment requirement unless such an accommodation would create an Undue Hardship. Employees have been open and receptive to the new Policy. The Policy has been used by students, faculty and staff.

- The Equal Opportunity and Compliance Office team, and partners from across the university developed the new online tool to better equip our search committee members to serve effectively in their roles, while paying special attention to diversity and inclusion. A number of key features and enhancements were added to allow for quick navigation throughout the module. The module also provided specific information for deans, department heads, directors and hiring officials along with search committee chairs. To date the new Search Committee Training Module has been accessed 1,234 times.
- OHR's Employment and Staffing:
 - Created an online Hiring Playbook for HR professionals and hiring managers located at: <https://hr.unc.edu/files/2019/04/Hiring-Playbook-Version-1.7.4-Read-Only.pdf>. The Playbook includes "5 Ways to Improve Equity, Diversity, and Inclusion in Your Hiring" which provides information on advertising to underrepresented constituencies, choosing a diversity sensitive committee, completing the search committee training, using structured evaluation methods in selection, and asking EOC when you have questions
 - Redesigned New Employee Orientation, *Welcome to Carolina Blue...Your Journey Begins here*, which is now mandatory for all EHRA NF and SHRA new hires. We now have all levels of staff in one class (e.g. SHRA, EHRA non-faculty, faculty) to create a more diverse and inclusive experience. In addition, we created new.unc.edu as part of our outreach efforts.

SCHOOL LEVEL

Several of the University's Schools feature the unit's diversity and equal opportunity statements, activities and initiatives on websites, publications and through other outlets. For example:

- **The School of Information and Library Sciences (SILS)** published a statement of diversity on a separate webpage on their website. The statement affirms that SILS embraces diversity as an ethical and social value and commits to preparing graduates to be leaders in a multicultural society by integrating diversity into the curriculum and research, recruiting underrepresented students, faculty, and staff, and participating in outreach to underserved groups.
- The **School of Social Work** publicized their commitment to diversity in their magazine, Contact. The magazine highlights SSW's diversity-related research and news, and regularly features diverse faculty and students. SSW also held a panel on supporting LGBTQI identities in the workplace.
- The **School of Nursing** showcased their commitment to diversity with the Pauline W. Brown Diversity Scholarship Award, which was awarded to an undergraduate or

graduate student who used the lens of race/ethnicity, class, gender, sexuality and culture to investigate the contributions of women and men of all colors to society, history, culture or thought. The School of Nursing also produced a quick fact sheet with data on the diversity of faculty, students, and staff.

- The **College of Arts and Sciences** highlighted the achievements of minority faculty, staff and students on the front page of their diversity website (<http://college.unc.edu/diversity/>). In the 2015-2016 year, the College featured more than 70 such stories, publicizing the racial and gender composition of minority students, faculty and staff. They also have 34 active department diversity liaisons. The diversity liaisons for physics and astronomy, biology, and chemistry had taken a leading role in developing trainings on unconscious bias in graduate admissions and faculty searches. In addition, the Dean's Faculty Advisory Committee on Diversity was established to advise the Dean on all matters of diversity and help the Dean develop a five-year plan for key initiatives around diversity and inclusion. The key initiatives include conducting a course inventory to identify intersections and course content on topics of diversity and inclusiveness; calling for a "supercourse" on topics of diversity and inclusiveness to be developed and taught in the College in spring 2017; and organized a series of faculty diversity workshops known as Understanding Differences during the spring and summer of 2016. Diversity messages from Dean and Director of Faculty Diversity Initiatives, signaled that the creation of an inclusive culture in the College was one of the highest priorities of the dean and his senior administration.
- The Dean's Council at the **Gillings School of Global Public Health**, composed of all department chairs, deans and directors plus student government leadership, rewrote the School's mission and values statements to more clearly reaffirm their commitment to diversity and inclusion, and took the lead in the process of refreshing their measures and setting quantitative benchmarks for diversity and inclusion. Department chairs and senior administrators reported their efforts and outcomes in advancing diversity and inclusion in annual reports. The Dean participated in an annual, student-led Minority Health Conference with more than 800 participants in attendance, including faculty and staff.

Carolina Public Health Magazine, published by the Gillings School of Global Public Health, focuses on research and practices aimed at reducing health disparities and improving health outcomes in vulnerable populations. It also frequently features diverse faculty, staff, and students. Additionally, it showcases initiatives, programs and research projects or opportunities, and highlight the achievements of minority students, faculty and staff

- The **School of Government** publicized their commitment to diversity on their website, noting how their commitment to diversity fits into their overarching mission to improve the lives of North Carolinians. The Dean wrote a public blog post on the School's statement of commitment to diversity. The Dean also asked the SOG's Diversity Committee to write a statement highlighting the focus on creating a culture of

inclusion, recruiting and hiring a diverse workforce, and welcoming diverse experiences and views in the School's teaching, writing, and advising. The Opening Access Working Group included over 70 administrators, faculty members and students who represented a wide array of units dealing directly with underserved student populations. Among these units were Academic Counseling, Accessibility Resources and Service, the American Indian Center, Diversity and Multicultural Affairs, Housing and Residential Education, the LGBTQ Center, and Scholarships and Student Aid. The working group met twice a year to shape programming and share information about best practices and/or progress of diversity and inclusion.

- The **School of Social Work** had a standing Diversity Committee and an organization known as the Race Inclusion Social Justice Initiative. The Diversity Committee, composed of faculty, staff, and students, met on a monthly basis to develop diversity education and awareness events for the School. The Race Inclusion Social Justice Initiative, also composed of students, faculty, and staff, highlighted issues of race and social justice and created supportive forums for dialogue on emerging race and social justice issues within the School, University, and the greater community.
- In the **School of Media and Journalism**, the Diversity and Inclusion Committee collected demographic information for the School's various committees, the Dean's Cabinet, and faculty and staff meetings to identify areas where cross-group learning and interaction or strategic goals setting were needed.
- The **Cecil G. Sheps Center for Health Services Research** had a growing program on the healthcare workforce that addressed diversity in that population.
- The **North Carolina Botanical Garden** incorporated a commitment to diversity into their overall mission and core values (<http://ncbg.unc.edu/mission-and-history/>). The North Carolina Botanical Garden offered programs to showcase diverse cultures, such as programs on Native American relationships to gardens and the linkages between natural resources and African-American history.
- **Carolina Seminars** participated in a collaboration with the Parr Center and the Institute of African-American Research to sponsor a special problem-focused seminar on racial literacies.

VII. Assignment of Responsibility, Accountability and Plan Administration

A. Chancellor's Responsibilities

The UNC Chapel Hill Chancellor is responsible for adhering to the policies and programs that have been adopted by the State Human Resources Commission and approved by the Governor; designating an EEO Officer who is responsible for the operation and implementation of the EEO Plan and providing the applicable access

to the EEO Officer regarding the aforementioned responsibilities; ensuring that institutional goals of “Compliance & Integrity” performance measures are included in all SHRA employee performance plans; communicating the university’s commitment to equal employment opportunity to the campus community; providing the necessary resources to ensure the successful implementation of UNC Chapel Hill’s EEO program; and ensuring the development and implementation of HR policies, procedures, and programs necessary to achieve a diverse workforce in each occupational category.

B. Equal Opportunity Officer

The Equal Opportunity Officer responsibilities, related to the **Plan**, include the following:

1. To continuously monitor the administration of the **Plan** and ensure its submission by March 1;
2. To help devise systems for the implementation of the **Plan** and the achievement of all program goals, including forms and procedures for the continuous reporting and monitoring of appointment, promotion, and salary actions;
3. Provide oversight in assurance that all employees are made aware of and have access to the Annual EEO Plan, EEO Policy, Reasonable Accommodation Policies, and Policy on Prohibited Discrimination, Harassment and Related Misconduct and develop strategies to prevent unlawful harassment and retaliation in the workplace;
4. To advise and assist the Vice Chancellor of Human Resources and Equal Opportunity and Compliance and senior administrative officers with respect to equal opportunity matters;
5. To receive and maintain complaints and concerns from individuals and groups with respect to employment actions alleged to have been based on discrimination in regard to age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status and to advise and assist such complainants in the handling of such complaints;
6. To identify problems with respect to the implementation of the **Plan**;
7. To keep the members of the University community informed of the progress and problems in the administration of the **Plan**;
8. To evaluate the effectiveness of the **Plan**; including analyzing and maintaining workforce data;
9. To serve as the University’s liaison with the U.S. Departments of Labor, the United States Department of Education, the Equal Employment Opportunity

Commission and other appropriate federal agencies with respect to equal employment opportunity matters;

10. To develop and facilitate training on state and federal EO laws and regulations, the **Plan**, harassment and discrimination prevention and reasonable accommodations for religion and individuals with disabilities;
11. To be a point of contact for organizations representing women, minorities, veterans, and individuals with disabilities;
12. To collaborate with EEO and Diversity & Inclusion special interest groups and coordinate special programs to enhance outreach and retention efforts of minorities, women, veterans and individuals with disabilities;
13. To meet with senior administrative officers and keep them informed of developments in all applicable equal opportunity areas including **Plan** goals and program objectives;
14. Ensure federal laws prohibiting job discrimination are posted in work locations where notices to applicants and employees are customarily posted and easily accessible to applicants and employees with disabilities;
15. Ensure that all newly hired, promoted, or appointed supervisors and managers are made aware of their responsibility to complete the required EEODF training, while significantly increasing the participation and completion rate of all current supervisory and management SHRA staff;
16. To serve as a consultant in all internal University EO related matters; and
17. To advise the Vice Chancellor, Of Human Resources and Equal Opportunity and Compliance concerning any needed revision(s) to the **Plan**.

Among the most important responsibilities of the Equal Opportunity Officer in monitoring the administration of the **Plan** is providing underrepresentation analysis information and consultation, outreach, training and monitoring of the recruitment process for compliance to equal employment opportunity regulations. The timing and nature of affirmative action in the initial hiring of SHRA staff is crucial to the success of the **Plan**. Affirmative action efforts should help to assure that recruiting and advertising efforts, both formal and informal, reach the widest possible number of potentially qualified and interested minority, women, veteran, and individuals with disabilities applicants.

For this reason, Office of Human Resources staff complete a Commitment file for each SHRA position recruitment which includes information about the vacant position, where the position was advertised beyond the Office of Human Resources (OHR) website, what special efforts were made to identify minority, women, veteran and individuals with disabilities applicants, and any other information evidencing a

thorough search was conducted. The affirmative action process is structured so the Departmental EO approver and/or Employment & Staffing, and Classification & Compensation staff can comment before key decisions are made, so that his or her advice may be considered in a timely fashion prior to any step in a particular selection process that will otherwise exclude from further consideration a substantial portion of the applicants who are minorities, women, veterans or individuals with disabilities.

C. Equal Opportunity Advisory Committee

The work of an Equal Opportunity Advisory Committee is completed by several Committees and workgroups across campus including:

Executive Advisory Council on Diversity and Inclusion: This Council is made up of executive leaders on campus. The Council receives updates from the University's Diversity and Inclusion Council on recommended policies, practices and procedures to ensure equitable hiring process, a campus free of discrimination and harassment, and the promotion of an inclusive campuses.

Diversity and Inclusion Council: This Council is made up of almost twenty University stakeholders. The Council provides guidance and input to the Executive Advisory Council on policies, procedures and practices that create and more inclusive working, learning and living environment.

Disability Advisory Committee: The Disability Advisory Committee is a longstanding University Committee led by the University's EOC. This Committee is comprised of a cross section of faculty, staff and students from across campus. The purpose of this Committee is to gather information from employees and students regarding ways to continually approve employment and educational access to the institution for individuals with disabilities.

Digital Accessibility Advisory Team: The University's Digital Accessibility Advisory Team (DAAT) is comprised of leadership from a cross section of University Offices, including staff members from Accessibility Resources and Services (ARS), Communications, Facility Services, Information Technology Services (ITS) Communications, and Office of University Counsel (OUC). DAAT members are charged with responding to issues related to website accessibility and serving as a liaison with vendors related to digital accessibility.

Religious Accommodations Advisory Committee: The Religious Accommodations Advisory Committee (RAAC) is charged with ensuring that reasonable request for Religious accommodations/absences are provided. Additionally, the RAAC provides general guidance on practices and procedures for the University community pursuant to the Religious Accommodations Policy.

In addition to the aforementioned, currently existing efforts, the University plans to

create a centralized Committee that will still be informed/directed by the aforementioned Committee. The Committee will meet to review, advise, and revise equal employment opportunity related policies, programs and practices based on the information gathered from the Committee and other University constituents. They will also serve as a communication link between management, employees and the Equal Opportunity Officer, regarding the Equal Employment Opportunity Program.

D. Responsibilities of Sr. Administrative Officers for Equal Opportunity

The Equal Opportunity and Compliance Office and the Equal Opportunity Advisory Committee have their essential roles in the achievement of equal employment opportunity in the University - roles as policy advisors, critics of performance, channels of information on problems and solutions, and other helpful roles. But the achievement of the goals of equal employment opportunity - the employment of larger numbers of minorities, women, veterans, and individuals with disabilities in those sectors of University employment where they are not now found in numbers commensurate with their availability - will depend on the people with day-to-day responsibility for making employment decisions in the University. This responsibility rests with the group of officers referred to in this **Plan** as the senior administrative officers of the University – the Chancellor, the Provost, the Vice Chancellor for Human Resources and Equal Opportunity and Compliance, the Associate Vice Chancellor for Human Resources, the Interim Associate Vice Chancellor for Equal Opportunity and Compliance, Deans, Directors and Department Chairs, and all other administrative employees in the University who have responsibilities in appointing, promoting and setting the salaries of University staff employees.

Hiring managers, supervisors and search committees are responsible and accountable together with the Equal Opportunity and Compliance Office, the Office of Human Resources and the University administration for meeting University goals which are designed to eliminate the under-representation of minorities and females in the workforce. They are also responsible for making good faith efforts towards achieving the federal utilization goal of 7%, per job group, for qualified individuals with disabilities, as well as, an overall University benchmark of 5.9% for protected veterans. These efforts will help eliminate the barriers to equal opportunity that cause under-representation for these protected classes, and achieve compliance with University and State employment policies and procedures. In the case of staff employees, it is the responsibility of the Office of Human Resources to act in effective support of the equal opportunity goals and programs by carrying out various administrative activities in coordination with the Equal Opportunity and Compliance Office. The Provost and Vice Chancellor for Human Resources and Equal Opportunity and Compliance provide the necessary measures and resources to effectively run the University equal employment opportunity plan and program. Managers and supervisors are strongly encouraged to maintain a diverse and

inclusive work environment while implementing management practices which support equal employment opportunity in all terms and conditions of employment.

VIII. Dissemination of the Equal Employment Opportunity Policy

The policy and policy statement is disseminated formally both internally and externally. Within the University, the policy and/or policy statement appears in several University sponsored publications. These publications reach all levels of University employees. Communications covering various informational and implementation aspects of the policy are published regularly online. Additionally, formal statements of the Equal Opportunity Policy are posted on departmental bulletin boards around the campus. A copy of the current edition of the **Plan** is available on the University website at: <http://eoc.unc.edu> for all departments, schools, units, and applicants. A copy of each archived edition of the **Plan** is available in the Equal Opportunity and Compliance Office.

A list follows showing the circulation of the publications, which has responsibility for each, and the time of publication.

A. Publications Reaching All Employees

Name of Publication	Responsibility	Time of Publication
Equal Opportunity and Compliance Office Home Page	Equal Opportunity and Compliance Office	Continuing
Posters and notices for departmental bulletin boards	Office of Human Resources and Dept. Heads	Continuing
EHRA Non-Faculty Position Permanent and Temporary Openings List (web-based copy)*	Office of Human Resources	As Received
SHRA Permanent and Temporary Position Openings List (web-based copy)*	Office of Human Resources	Hourly
SHRA Permanent Job Openings List (hard copy)*	Office of Human Resources	Weekly
Tenured/Tenure Track Faculty Position Openings List (web-based copy)*	Office of Human Resources	As Received

* listed on the University's Office of Human Resources Careers at UNC Chapel Hill page:
<https://hr.unc.edu/careers/>.

B. Publications Reaching the Faculty

Name of Publication	Responsibility	Time of Publication
Faculty Handbook	Faculty Welfare Committee and Office of Faculty Governance	Continuing

C. Publications Reaching Staff Employees

Name of Publication	Responsibility	Time of Publication
Memoranda	Of Human Resources and Equal Opportunity and Compliance (Office of Human Resources, Equal Opportunity and Compliance Office and Diversity & Inclusion)	Continuing
SHRA Employee Policies	Office of Human Resources	Continuing
EHRA Non-Faculty Employee Policies	Office of Human Resources	Continuing

Additionally, the Office of Human Resources conducts a formal orientation program for all new permanent SHRA and EHRA Non-Faculty employees where portions of the Equal Opportunity Policy are reviewed. Supervisors are also required to attend the Blueprint for Engaged Supervision Training (BEST) program, a mandatory program designed to educate and motivate UNC's frontline supervisors. The BEST program emphasizes practical and basic needs of all supervisors, including an understanding of the University's commitment to equal employment opportunity and an environment free from unlawful discrimination, harassment and retaliation. Day two of the program is comprised of the Equal Employment Opportunity and Diversity Fundamentals training session, which is required by law for all managers and supervisory employees. The course provides an in-depth and hands-on understanding of federal and state equal employment opportunity and affirmative action laws in the context of daily work situations.

With respect to external dissemination of the University's Equal Opportunity Policy, the following list outlines some of the ways the policy is disseminated externally and the persons who have the continuing responsibility for the particular dissemination.

Means of Dissemination

Responsibility

Incorporate the "Equal Opportunity Employer" phrase in all purchase orders and contracts.

Purchasing Services, Office Sponsored Research, and Construction Management

Incorporate the Equal Opportunity statement "UNC-Chapel Hill is an equal opportunity employer that welcomes all, including protected veterans and individuals with disabilities in all employment notices and advertisements."

Employment & Staffing and Equal Opportunity and Compliance

Communicate to prospective employees the existence of the policy and make available such elements as appropriate. Distribute specialized outreach materials. Facilitate outreach training sessions.

Equal Opportunity and Compliance Office

Send written notification of University policy to all subcontractors, vendors and suppliers communicating obligations and responsibilities under the **Plan**.

Purchasing Services, Office Sponsored Research, and Construction Management

Make formal contacts with recruiting sources, including minority and women's organizations, veteran, and disability services providers, to explain the University's policies and to seek qualified job applicants.

Employment & Staffing, Equal Opportunity and Compliance and department heads

IX. Reasonable Accommodations (Disability & Religious)

A. ADA Reasonable Accommodations for Employees, Applicants and Visitors Policy

The University of North Carolina at Chapel Hill is committed to equal opportunity in all aspects of employment for qualified individuals with disabilities. In accordance with the Americans with Disabilities Act (ADA) and other federal and State law, and consistent with the University's Policy on Prohibited Discrimination,

Harassment and Related Misconduct, it is the policy of the University to provide reasonable accommodations in employment to any qualified individual with a disability unless the accommodation would impose an undue hardship on the operation of the University's business or would change the essential functions of the position. Retaliation against an individual with a disability for utilizing this policy is prohibited.

B. Family & Medical Leave (FMLA) for Pregnancy Related Illness

The University of North Carolina at Chapel Hill is committed to promoting health and wellness to all of its pregnant campus community members. The University implemented the Procedure for Pregnancy and Related Medical Conditions for Accommodations for Students and Applicants. While a similar policy has not yet been created for University faculty and staff, pregnant employees are eligible for pregnancy related resources and programs including the newly approved Parental Leave Policy (PLP) effective January 13, 2020, which provides paid parental recuperative leave as well as paid parental bonding leave; coverage under Family and Medical Leave (FMLA) for serious health conditions, including incapacitation due to pregnancy and prenatal medical care, that make them unable to perform essential functions of their job; and assistance through the Lactation Support Policy, which assists working mothers with their transition back into the workplace following the birth of their child.

Additionally, University managers and supervisors are strongly encouraged to work with the University's EOC or central Office of Human Resources when there is a concern related to pregnancy. The University's working environment is very flexible and understanding with employees who are pregnant.

C. Policy on Religious Accommodation

The University of North Carolina at Chapel Hill is committed to providing a welcoming and inclusive environment that is respectful of the religious beliefs and practices of all members of the University community. As part of this commitment, the University will make good faith efforts to provide reasonable Religious Accommodations to individuals covered by this Policy whose sincerely held religious beliefs and practices conflict with a University policy, procedure, or other academic or employment requirement unless such an accommodation would create an Undue Hardship. The University is committed to diversity and nondiscrimination and supports the employment of all qualified individuals, regardless of religious affiliation or beliefs. This commitment is in accordance with state and federal laws and regulations, including Title VII of the Civil Rights Act of 1964 and its accompanying regulations, as well as the Equal Employment Opportunity Commission Guidelines on Discrimination Because of Religion, and North Carolina General Statute § 116-11(3a). As stated on page 14 of this document, the University created an official Religious Accommodations Policy during the applicable time period.

X. Equal Employment Opportunity & Diversity Fundamentals (EEODF)

All new supervisors are required to attend Equal Employment Opportunity and Diversity Fundamentals (EEODF) training within the first year of becoming a supervisor. This training is offered by the Office of State Human Resources (OSHR) and coordinated through the campus Equal Opportunity and Compliance Office. This day-long program addresses EEO law compliance and workplace diversity in state government. The program focuses on developing awareness and building skills to use on the job. Information regarding the Equal Employment Opportunity and Diversity Fundamentals, is available at <http://eoc.unc.edu/what-we-do/equitable-employment-opportunities/>.

Prior to 2017, EEODF was primarily offered off campus in downtown Raleigh, NC. This offsite training location often presented travel problems for its intended participants. The University offers EEODF on-site at the UNC Chapel Hill campus. The on-campus EEODF is facilitated by five state-certified adjunct trainers that are members of the Equal Opportunity and Compliance Office, with an additional three members in the process of obtaining their certification. During the Plan year, 246 employees completed EEODF at UNC's campus.

Periodic special training is conducted by the Chancellor or his designee and the Equal Opportunity and Compliance Office to explain the University's Equal Opportunity Policy to University administrators and to define individual responsibility for the effective implementation of equal employment opportunity. Managers and supervisors receive routine day-to-day training and coaching from the Office of Human Resources.

XI. Responsibility for Establishing Procedures for SHRA Employment

The responsibility for designing the reporting forms, procedures and schedules, and for devising the methods of review of the reports and of the results achieved through equal opportunity programs undertaken, is that of the Equal Opportunity and Compliance Office, the Office of Human Resources, and the senior administrative officers. The monitoring process covers recruiting methods, initial appointments, promotions, reclassifications, transfers, demotions, reinstatements, and salary-setting actions. These decisions and actions are amply documented to permit the required monitoring.

Reporting and Monitoring

Compliance with this **Plan** requires the use of methodical and formal procedures in evaluating applicants for initial appointment, promotion, reassignment, transfer, demotion, re-appointment, and salary-setting actions. University procedures require that careful records of selection and non-selection decisions be maintained on file.

These procedures have been designed to help ensure that decision making at all levels, from the department through the Chancellor's office, are without consideration of age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status or political affiliation/influence, and that in appearance as well as in fact, fairness prevails.

Comprehensive records of decisions and their justifications are required and maintained so that reviewing officers remain informed of efforts to recruit and hire minorities, females, veterans, and individuals with disabilities. Also, records are maintained to enable the University to respond to any future inquiry with respect to any appointment, promotion, reassignment, transfer, demotion, reappointment, and salary setting decision made by a department.

The senior administrative officers of the University and the Equal Opportunity and Compliance Office continuously review procedures and records pertaining to employment activities. This review ensures compliance and results in improvement to processes and procedures.

Employment & Staffing, using the data on SHRA applicants and referrals, annually compares applicant metrics. Specifically, Employment & Staffing routinely utilizes data obtained from HR systems on SHRA incumbency v. estimated availability to consult with campus departments on underrepresentation of minorities and females. Respective departments focus their recruitment efforts to increase the applicant pools in job groups where underrepresentation exists.

Methods used by the Office of Human Resources to ensure that employment decisions are made in accordance with the **Plan** include the following:

- Maintaining centralized application and referral procedures and systems;
- Offering continued training on HR systems and a campus-wide HR model with defined roles and responsibilities;
- Offering continuing education and training of Office of Human Resources staff, Carolina HR Council, and Human Resources Representatives as to relevant laws, policies, systems, data and equal employment opportunity objectives;
- Recommending the Equal Opportunity and Compliance Office Search Committee training to hiring managers. Training is available at: https://sakai.unc.edu/access/content/user/cehall/SCT_2/index.htm
- Routinely utilizing data obtained from HR systems on SHRA applicants and referrals to consult with campus departments on under-representation of minorities and females;
- The Talent Acquisition Partners provide consultative services for under-representation and hiring activities to their assigned departments;
- Extensively recruiting from all reasonably available sources to maximize the

- number of minority, female, and veteran applicants from those available in the University's recruitment area;
- Continuing recruitment from local vocational rehabilitation offices and other sources for referral of individuals with disabilities interested and available in the University's recruitment area;
- Referring applications from qualified internal and external applicants, with due regard for equal opportunity, to departments;
- Reviewing and following-up on hiring decisions with hiring departments as to correct application of hiring policy and compliance with equal employment opportunity initiatives;
- Continuing to communicate the SHRA Grievance Policy and Procedure for reporting complaints of alleged discrimination, without complainants' fear of reprisal; and
- Ensuring prompt and responsive handling of any such complaint.

The University and the Office of Human Resources will at appropriate intervals, re-examine the various aspects of its equal opportunity efforts. Should any instances of discrimination be discovered, the appropriate University officials will take prompt corrective actions.

XII. Equal Employment Opportunity Programs

A. EEO Program Area Goals

Program Area	Goal
Recruitment	Collaborate more effectively with campus entities to obtain as well as provide a wide variety of diverse recruitment sources for utilization throughout the University.
Selection	Continue to ensure that the University's procedures for SHRA employment are used methodically and consistently in every recruitment. Provide an updated search committee training module for use throughout the campus.
Job Structuring/ Compensation	Analyze compensation and job structuring practices to identify any potential areas of adverse impact.
Training	Provide all employees access to free training opportunities to enhance their skills and readiness for career opportunities.
Transfer, Promotion, Termination	Identify trends that highlight any potential issues of adverse impact.
Performance Management	Hold managers, supervisors and employees accountable for

	their progress towards meeting the university's institutional goals regarding compliance and integrity by complying with equal opportunity policies and meeting the EEO hiring objectives, as applicable.
Disciplinary Procedures & Grievance Process	Provide equitable treatment for all employees in accordance with the SHRA Disciplinary Action Policy and the University SHRA Employee Grievance Policy.
Onboarding	Ensure that all SHRA and EHRA non-faculty employees attend the applicable mandatory new employee orientation and access to information to ensure their understanding of their role and the University's commitment to discrimination and harassment prevention.

B. Recruitment

The University of North Carolina at Chapel Hill will strive to actively recruit from a variety of sources to achieve a diverse workforce that successfully meets the needs and demands of the University. The hiring department, with assistance and guidance from the Classification & Compensation Consultants do the following:

- Assess the need for the position to ensure it contributes to meeting the goals, objectives, and mission of the work unit;
- Conduct a job analysis including a review of the duties and responsibilities of the position, and the qualifications required for organizational success; and
- If necessary, revise the position description.

Job analysis is necessary only when there is a change in the duties and responsibilities that impact the qualifications and competencies required. If a current, accurate job analysis already exists for a given job type, there is no need to conduct an analysis for each vacancy. For example, in instances where there is a high volume of positions in a classification, frequent turnover in a classification, or little job change, there will likely not be a need to conduct a new job analysis each time a vacancy occurs. The hiring department in consultation with Employment & Staffing and Classification & Compensation staff ensures that the critical tasks (essential functions), knowledge, skills and abilities, training and experience requirements necessary for successful performance of the duties of the position are identified (including any additional position-specific factors). The knowledge, skills and abilities described in classification specifications developed by the Office of State Human Resources (OSHR) may be used for recruitment and selection purposes where they are sufficient to differentiate among the qualifications of applicants.

A department needing to fill an open permanent position notifies Employment & Staffing by submitting a request to post a position to their department's Human Resources Representative. The Human Resources Representative initiates the posting in the applicant tracking system. The Talent Acquisition Partners review the posting to ensure compliance with equal employment opportunity and ADA standards. The position posting includes the Equal Opportunity statement, "The University of North Carolina at Chapel Hill is an equal opportunity employer that welcomes all to apply, including protected veterans and individuals with disabilities." Talent Acquisition Partners use information from the state job classification, as well as, any additional information provided by the hiring department, to review the vacancy announcement and ensure its compliance with State and University requirements. Talent Acquisition Partners also consult with the department about including additional job duties and essential skills, as well as, preferred qualifications in vacancy announcements. In addition, Talent Acquisition Partners consult with the hiring department to determine the need for additional recruitment advertising in professional journals, newspapers, professional journals, diversity websites, and Historical Black Colleges and Universities to target specific audiences.

Each permanent recruitment is initially posted for no less than five business days and includes a closing date. Generally, extensions to posting periods must be for at least three business days. The maximum posting period for recruitment is six months from the date of the initial posting; this maximum posting period includes initial recruitment and extensions as determined by the hiring department. Unless an exception to the posting policy is approved, the customary employment procedure is to post the opening for a minimum of five business days on the designated internet websites (www.jobs.unc.edu, www.uncjobs.northcarolina.edu, ncdiversity.com, hercjobs.org, insidehighered.com, and www.nccommerce.com/workforce/job-seekers), as well as on job posting boards located outside of the Office of Human Resource's office at the Administrative Office Building (AOB), 104 Airport Drive, Chapel Hill, NC. Graystone Advertising Group was added to the advertising section of the posting in the applicant tracking system to enable departments to easily work with advertising specialist to target diversity advertising.

Under the direction of the Assistant Director, Employment, the Talent Acquisition Partners are responsible for permanent staff (SHRA) recruitment and for ensuring the preliminary screening and approval of selected candidates for interview to departments per policy. Talent Acquisition Partners review and coordinate all applicant screening and referrals, ensure proper handling of applicants with priority status, analyze and approve selected applicant qualifying salary, submit defined salary exceptions to UNC System Office for approval and negotiate the job offer for a designated set of campus departments. Applications are reviewed and qualified based on Office of State Human Resources (OSHR) career banding guidelines and the *University SHRA Qualifications Screening Guide*.

Prior to the vacancy closing date, the hiring department will determine any selection tool(s) that will be used in the final evaluation process. Any selection tool(s) used will be objective, based upon job-related knowledge, skills and abilities, and consistently applied to all applicants in the final selection pool. Talent Acquisition Partners and Equal Opportunity and Compliance Office representatives are available for consultation and assistance in determining selection tool(s). Some examples of selection tools (excluding typing and spelling tests) include a structured interview, reference checks, and on an exceptional basis and with advance approval from the Equal Opportunity and Compliance Office, in basket exercises, written tests, and skills tests.

The departments are responsible for reviewing applications received based on overall qualifications and for being mindful of special priority considerations established by OSHR, such as promotional priority, re-employment (layoff) priority, veteran's preference, or return from workers' compensation, if applicable. From this screening process, departments will choose applicants for interview. Applicants selected for interview are then reviewed and approved by the Talent Acquisition Partners to make sure they meet the minimum essential qualifications. The department then selects the most qualified candidate from those interviewed based on the posted essential knowledge, skills and abilities. Generally, the Office of Human Resources expects departments to interview at least three of the most qualified applicants for a vacancy.

1. **Applicants and Applications**

An important foundation for recruiting is the management of SHRA permanent ***Applications for Staff Employment***. For the purpose of the **Plan**, an applicant is any person who submits a completed application via the University of North Carolina, at Chapel Hill online via the applicant tracking system during the open posting period. Each application identifies the specific position number, position title, and department number of the position for which the applicant is applying. In addition to completing the application, an applicant may complete an addendum as necessary.

The application includes the following Equal Opportunity statement and the University's "Equal Opportunity Pledge," which states, The University of North Carolina at Chapel Hill is an equal opportunity and affirmative action employer. All qualified applicants will receive consideration for employment without regard to age, color, disability, gender, gender expression, gender identity, genetic information, race, national origin, religion, sex, sexual orientation, or status as a protected veteran, which summarizes the University's equal opportunity commitment.

The application also includes a demographic data information section within which the applicant voluntarily indicates gender, race, and ethnic background. In addition, the applicant is given the opportunity to voluntarily indicate his or her protected veteran status (if any) and

disability. The demographic data information section includes a statement that the Federal Government requires the University to obtain, monitor and report certain demographic data including gender, race, ethnicity, protected veteran status and disability (if any). It makes clear that "...this information will remain confidential and will be used only by the UNC - Chapel Hill Equal Opportunity and Compliance Office for statistical purposes." In fact, this demographic information is stored separately from the application to maintain confidentiality. It is not viewed by any departmental Human Resources Representative and is never shown to an employing department.

Each applicant is provided links with information describing the SHRA application procedures, Equal Employment Opportunity (EEO) is the Law poster, campus security report, and applicant frequently asked questions.

To be considered for employment, an Application must contain the following:

- Complete education and all work experience history; this includes dates employed and, if part-time, number of hours worked per week; and
- An electronic signature when the application is submitted electronically via the University's applicant tracking system

A complete application is required online in the University's applicant tracking system for each position for which an applicant desires consideration. Applications must be received prior to the specified closing date and time, in order to be considered. The application remains active until the corresponding position is filled or cancelled. The applicant pool includes individuals who have applied to: (1) posted openings at the Administrative Office Building and online at: www.jobs.unc.edu; (2) employment advertisements in newspapers, professional publications, and on recruitment websites (i.e. indeed.com, Graystone Advertising Group, etc.); (3) job postings through the NC Commerce, Workforce Solutions Division website; (4) job postings through the University of North Carolina-System Office website; (5) job postings through ncdiversity.com; (6) job postings through insidehighered.com; (7) job postings through hercjobs.org; and (8) positions that potential applicants learned about at career fairs.

If no applicants exceed the minimum qualifications and adequate employment, the hiring department may consider the remaining applicants to be the most qualified applicant pool. Or, the hiring supervisor may choose to extend the closing date in additional increments up to 6 months, should the initial recruitment efforts not generate sufficient applications. Any applications received after the initial closing date and time and prior to

the new closing date and time would be considered for referral.

Occasionally, departments may identify potential applicants through informal sources. In these cases, departments inform applicants to use the University's online applicant tracking system, , to apply for any staff opening. The Talent Acquisition Partners ensure that all applications that are screened and referred meet the Office of State Human Resources policy and minimum qualifications for the position.

All employment facilities are open to all applicants on the same basis, by policy and practice and, as requested, accommodations are made for any applicant who voluntarily self-identified as having a disability.

2. **Posting and Advertising Permanent Staff Position Openings**

a. Permanent SHRA Staff Openings

- The hiring department is required to post the Announcement of SHRA Position Recruitment for each of its staff openings within the department. Departments may post permanent and time-limited SHRA positions for internal and external applicants or post as "Internal Only."
- Employment & Staffing coordinates all other recruitment functions including:
 - The posting process for SHRA positions. This continues until the closing date passes, recruitment is put on hold or canceled, or until the hiring supervisor extends the closing date and the new closing date passes.
 - A current abbreviated Staff Openings List. This is posted outside the Administrative Office Building weekly on Wednesdays by Employment & Staffing. The detailed Staff Opening List is available in a binder at the main reception area of the Office of Human Resources.
 - A searchable electronic copy of the Staff Openings List. This is posted on the Office of Human Resources website at www.jobs.unc.edu and is updated instantly to include all new permanent SHRA Recruitment Requisitions processed during the workday.
 - A job offer for departments without delegated authority.
 - A job offer or other commitment for an opening is prohibited

prior to the posted closing date. In emergency circumstances, the five-business day posting requirement may be waived with advance approval from the Sr. Director of Employment & Staffing.

- Timely notification is provided to each applicant interviewed for a position after the selection decision is made and the position is filled. In addition, all applicants to a position for which recruitment is cancelled will receive a notification by email.

Employment & Staffing, as feasible, works with departments to consult on advertising for position openings in a job group where there is difficulty in attaining a sufficient pool of qualified applicants. Departments are also referred to Graystone Advertising Group for the placement of advertisements.

The University, with respect to affirmative recruiting for disability status, subscribes fully and without reservation to Federal and State laws and to increasing its employment of individuals with disabilities, when otherwise qualified. The recruitment described herein contributes significantly to the objective of increasing the employment of individuals with disabilities and advancing their employment. The University continues its commitment to employing individuals with disabilities and supporting, through any requested reasonable accommodation, their success when employed.

The University, with respect to affirmative recruiting for veterans, subscribes fully and without reservation to Federal and State laws and to increasing its employment of veterans, when otherwise qualified.

Continuing recruitment activities for staff employees include the following:

- Posting the Staff Permanent Openings List daily on the on-line application system at www.jobs.unc.edu. The list is also posted at the Administrative Office Building, 104 Airport Drive each Wednesday by Employment & Staffing;
- Participating in Job/Career Fairs sponsored by recruiting sources, community organizations, veteran organizations, local Department of Social Services, and other area employers;
- Periodically contacting community organizations such as the NC Commerce, Workforce Solutions Division as well as, organizations for veterans and Individuals with Disabilities (IWD);

- Providing the www.jobs.unc.edu URL to other agencies, such as the NC Commerce, Workforce Solutions Division the University of North Carolina-System Office, and the Office of State Human Resources to establish links between the websites;
- Providing collateral materials such as recruitment handouts and marketing items to agencies, minority groups, and community organizations;
- Recommending placing advertisements through Graystone Advertising Group, as appropriate, in diversity recruiting sources such as the *Diverse Issues in Higher Education* and the *INSIGHT into Diversity*, as well as, cross-posting on Indeed.com partner diversity sites, ncdiversity.com, insidehighered.com and hercjobs.org;
- Attending and networking at professional meetings such as Triangle Industry Liaison Group (TILG) meetings and Disability: IN NC; and
- Applicant screening and referral to departments with open staff positions.

All applications for a position are automatically screened based on responses provided to supplemental questions via the University's applicant tracking system. The Talent Acquisition Partners screening of applications occurs for candidates that will be interviewed in accordance with the Minimum Recruitment Standards established by OSHR and *University SHRA Minimum Qualifications Screening Guide* through the applicant tracking system. The continuing training of Talent Acquisition Partners and their stated personal freedom from commitment to Equal Opportunity bias minimizes the possibility of discrimination based on of age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status, or political affiliation/influence in making referrals.

The University performs a comprehensive pre-employment background check including: federal, state and local criminal conviction records, driving record (for positions requiring driving), nationwide sexual offender check and federal debarment (System for Award Management List and Office of Inspector General) check for all new and current employees when they have a change in status such as a promotion or voluntary demotion. The University does not automatically reject applicants based on conviction records. The University does not perform credit checks of applicants, except as part of the background investigation of applicants considered for sworn positions in the UNC

Police Department. Marital status, dependency, or minor children as such have no influence in the screening, referring and hiring decisions.

Applicants with questions regarding the hiring process are encouraged to call the Talent Acquisition Partner, or the Office of Human Resources Service Center for more information. In certain cases, applicants may also meet with a Talent Acquisition Partner to have more complex questions answered via email or in person.

The Talent Acquisition Partners carry out the responsibilities through oversight of the application screening and referral process. Among other things, this process provides for the referral of applications to hiring departments, submitted by applicants within the posted recruitment period who have specified a position number, department number and classification title for the departmental position, and which meet the State's Minimum Recruitment Standards as established by OSHR for the job classification. These State standards are expressed as minimum education and experience requirements and are shown in the appropriate classification specification issued by OSHR. The Talent Acquisition Partners thoroughly examines each application selected for candidate interview and determines if the candidate meets the State's Minimum Recruitment Standards before the department can conduct an in-person formal interview of the candidates. The State's Minimum Recruitment Standards also apply to employees who are eligible for veterans' preference (as per OSHR policy) and layoff priority consideration.

An eligible veteran or eligible spouse/dependent who is not a current State employee shall be hired when overall qualifications are substantially equal to the non-eligible persons in the most qualified applicant pool who do not have a priority described below.

- If the selection decision is between an eligible veteran or eligible spouse/dependent who is not a State employee and a substantially equal applicant with a priority described below, the applicant with the priority described below shall be selected.
 - o A qualified current State employee who has completed the probationary period and has career status seeking a promotion.
 - o A qualified State employee with layoff reemployment priority.
 - o An employee returning from workers' compensation leave or military leave.

- A qualified employee separated from an exempt policy-making or exempt managerial position for reasons other than just cause.

For eligible veterans or eligible spouse/dependents who are current State employees seeking promotion, reassignment or lateral transfer, the eligible person competes with all other applicants who have substantially equal qualifications.

The hiring department receives all applications meeting the State Minimum Recruitment Standards and performs the second level of evaluation. The determination of the pool of most qualified applicants cannot be made by the hiring department until after the position closes.

When a hiring department representative evaluates applications to determine which applicants to interview, s/he must:

- have specific knowledge of the job(s) being filled; and
- be familiar with selection guidelines, if not previously trained in recruitment, selection and hiring processes, and will learn selection policies, guidelines and procedures through specific training or through self-study. The Equal Opportunity and Compliance Offices' Online Search Committee training is available at:
https://sakai.unc.edu/access/content/user/cehall/SCT_2/index.htm

Employment & Staffing is available to advise, if needed, to ensure that policies and procedures are consistently applied. The department conducts essential reference checking, makes the employment decision and submits the required job-related documentation on each referred applicant to the designated Talent Acquisition Partner via the selection document (hiring proposal). The Talent Acquisition Partner confirms the appropriate salary for the job offer with the department, reviews and conducts an individual assessment on any background check with adverse results, and advises the department on salary administration and other appropriate personnel policies and procedures.

The Talent Acquisition Partner or trained department representative extends the offer to the selected candidate and confirms the salary acceptance and proposed effective date. If the selected candidate is an external applicant, the Conditions of Employment are reviewed and, if the offer is accepted, the applicant is scheduled for a New Employee Orientation (NEO). Then the Talent Acquisition Partner

prepares electronic documents including the salary approval form (if applicable) the application, hiring proposal with internal pay alignment, and a copy of the posting and attaches them to the hiring action in ConnectCarolina. The School/Division HR representative uploads the cleared background check summary document to the hiring action. -Following NEO, Staffing Services uploads policy acknowledgement, DD-214 (if applicable) and signed COE. HR Records uploads service document once service credit is verified. Staffing Services manually scans and emails EEO Data forms documents to EOC.

The customary procedures for referral for applicant referrals are followed day-to-day. However, as might be expected in a dynamic work environment, minor variations are necessary to handle contact with applicants and employees, the continuing contact between Employment & Staffing and hiring departments, the scheduling of interviews by department representatives, and essential reference checking by the departments and related processes. These variations, when they occur, must not contravene the spirit of equal employment opportunity.

The number of qualified applicants for some types of positions may vary widely, either seasonally or according to occupation availability. At any given time, there may be few applicants or a multitude of applicants for a given opening, and increasingly greater campus needs for qualified applicants. Regardless, it is not the University's practice or interest to turn away any applicant qualified for an open position, except when a better-qualified applicant is selected.

b. SHRA Temporary Recruitment

This section applies only to temporary SHRA employees hired directly onto department payrolls (Direct Hire Temporary). There are three (regular temporary, intermittent temporary, retiree temporary) direct hire temporary appointment types.

1. A “regular temporary” SHRA appointment is an employment status of limited duration, normally not to exceed three to six months. In no case shall the temporary employment period exceed 12 consecutive months. When a temporary employee has worked for 12 consecutive months at the University, the employee’s appointment must be terminated without exception. The employee cannot be hired into another temporary appointment of any kind with the University for at least 31 calendar days. Because the University as a whole is considered

one employer, a 31-day break in service must be from the University, not just from one department. Likewise, individuals on this mandated break may not be re-employed by the University through an outside temporary agency or through any other third-party entity. A new temporary employment period will commence if the individual returns to work as a regular or intermittent temporary employee following the 31-day break in service. If the need for a temporary staffing situation is beyond 12 months, a time-limited position should be considered. Creation of time-limited positions is through Classification and Compensation Consultants in the Office of Human Resources.

2. An “intermittent temporary” SHRA appointment may be made to positions needed only for occasional periods. This type of appointment shall not exceed a total of 1,500 hours during any continuous 12-month period. If an intermittent temporary exceeds this hour limitation, the employee must be designated as a regular temporary employee and is immediately subject to the 31-day break in service rule.

3. A “retiree temporary” SHRA appointment is an employment status for individuals who are drawing a retirement income and/or social security benefits. State policy allows retirees in temporary appointments to work beyond 12 consecutive months so long as the employee certifies on the Conditions of Employment that he/she is not available for or seeking permanent work and has benefits through his/her retirement plan or Social Security. Employees who retire from the State of North Carolina and receive a pension through the State are limited in the salary amount they can continue to receive as a temporary employee for the State. A “retiree temporary” who is hired at a FTE of 75% or greater is no longer eligible for the retiree health coverage and must be placed on the active group plan at the department’s expense.

Consistent with Federal and State law and University policy, the University does not practice or condone age discrimination. Even so, there are certain circumstances under which age limitations may lawfully apply for employees (including temporary employees), such as:

- Persons must be at least 16 years of age in order to be considered for temporary employment.

- Law enforcement officers must be at least 21 years of age, as required by State law.

Importantly, there is no maximum age for employment. A department needing to fill an open temporary position notifies Employment & Staffing by initiating the posting in the applicant tracking system. The Talent Acquisition Partner creates a position number and review the posting to ensure compliance with equal employment opportunity and ADA standards. The position posting includes the Equal Opportunity statement, “The University of North Carolina at Chapel Hill is an equal opportunity employer that welcomes all to apply, including protected veterans and individuals with disabilities.” Talent Acquisition Partners use information from the state job classification, as well as any additional information provided by the hiring department, to review the vacancy announcement and ensure its compliance with State and University requirements. Talent Acquisition Partners also consult with the department about including additional job duties and essential skills, as well as, preferred qualifications in vacancy announcements. In addition, Talent Acquisition Partners consult with the hiring department to determine the need for additional recruitment advertising in professional journals, newspapers, professional journals, diversity websites, and technical colleges/universities to target specific audiences.

Each temporary recruitment is initially posted for no less than three business days and includes a closing date. Unless an exception to the posting policy is approved, the customary employment procedure is to post the opening for a minimum of three business days on the designated internet websites (www.jobs.unc.edu, www.uncjobs.northcarolina.edu, ncdiversity.com, and www.ncommerce.com/workforce/job-seekers), as well as in binders located in the Office of Human Resource’s main reception area at the Administrative Office Building (AOB), 104 Airport Drive, Chapel Hill, NC. The department is responsible for staff (SHRA) temporary recruitment and for ensuring the preliminary screening and approval of selected candidates for interview is according to policy. Temporary position postings use equivalent Office of State Human Resources (OSHR) classifications and minimum training and experience. The hiring department is responsible for ensuring the temporary employees meet the posted minimum recruitment requirements.

Prior to the vacancy closing date, the hiring department will determine any selection tool(s) that will be used in the final evaluation process. Any selection tool(s) used will be objective,

based upon job-related knowledge, skills and abilities, and consistently applied to all applicants in the final selection pool. Talent Acquisition Partners and Equal Opportunity and Compliance Office representatives are available for consultation and assistance in determining selection tool(s). Some examples of selection tools (excluding typing and spelling tests) include a structured interview, reference checks and on an exceptional basis and with advance approval from the Equal Opportunity and Compliance Office, in basket exercises, written tests, and skills tests.

The departments are responsible for reviewing applications received based on overall qualifications. From this screening process, departments will choose applicants for interview. The department then selects the most qualified candidate from those interviewed.

An important foundation for recruiting is the management of applications for staff employment. For the purpose of the **Plan**, an applicant is any person who submits a completed application via the University of North Carolina, at Chapel Hill online applicant tracking system during the open posting period. Each application identifies the specific posting number, position title, and department number of the position for which the applicant is applying. In addition to completing the application, an applicant may complete an addendum as necessary.

The application includes the following Equal Opportunity statement and the University's "Equal Opportunity Pledge." The University of North Carolina at Chapel Hill is an equal opportunity and affirmative action employer. All qualified applicants will receive consideration for employment without regard to age, color, disability, gender, gender expression, gender identity, genetic information, race, national origin, religion, sex, sexual orientation, or status as a protected veteran, which summarizes the University's equal opportunity commitment.

The application also includes a demographic data information section within which the applicant voluntarily indicates gender, race, and ethnic background. In addition, the applicant is given the opportunity to voluntarily indicate his or her protected veteran status (if any) and disability. The demographic data information section includes a statement that the Federal Government requires the University to obtain, monitor and report certain demographic data including gender, race,

ethnicity, protected veteran status and disability (if any). It makes clear that "...this information will remain confidential and will be used only by the UNC - Chapel Hill Equal Opportunity and Compliance Office for statistical purposes." In fact, this demographic information is stored separately from the application to maintain confidentiality, is not viewed by any departmental Human Resources Representative, and is never shown to an employing department.

Each applicant is provided links with information on the application portal page to "Working at Carolina", "Equal Employment Opportunity (EEO) is the Law" poster, and campus "Security Report."

To be considered for employment, an application must include an electronic signature when the application is submitted electronically via the University's applicant tracking system.

A complete application is required online in the University's applicant tracking system for each position for which an applicant desires consideration. Applications must be received prior to the specified closing date and time, in order to be considered. The application remains active until the corresponding position is filled or cancelled. The applicant pool includes individuals who have applied to: (1) posted openings at the Administrative Office Building and online at: www.jobs.unc.edu; (2) employment advertisements in newspapers, professional publications, and on recruitment websites (i.e. indeed.com, etc.); (3) job postings through NC Commerce, Workforce Solutions Division; (4) job postings through the University of North Carolina-System Office website; (5) job postings through ncdiversity.com; and (6) positions that potential applicants learned about at career fairs.

If no applicants exceed the minimum qualifications and adequate employment, the hiring department may consider the remaining applicants to be the most qualified applicant pool. Or, the hiring supervisor may choose to extend the closing date, should the initial recruitment efforts not generate sufficient applications. Any applications received after the initial closing date and time, and prior to the new closing date and time would be considered for referral. Occasionally, departments may identify potential applicants through informal sources. In these cases, departments inform applicants to use the University's online application system, to apply for any staff opening.

All employment facilities are open to all applicants on the same basis, by policy and practice and, as requested, accommodations are made for any applicant who voluntarily self-identified as having a disability and requests an accommodation.

3. Applicant Inquiries

Employment & Staffing actively solicits applicant feedback as to any problem or concern arising in the employment process. The Office of Human Resources Service Center, Staffing Support Services Specialist, Assistant Director, Employment, Staffing Manager, and the Sr. Director of Employment & Staffing are available to any applicant experiencing difficulty with the applicant tracking system. In addition, Talent Acquisition Partners located in the Administrative Office Building are available to any applicant who feels they has been unfairly treated in this process. Each Talent Acquisition Partner has the responsibility for handling such inquiries. The Sr. Director of Employment & Staffing and Director, Equal Opportunity and Compliance are also available and always receptive to investigate any complaint. The Associate Vice Chancellor of Human Resources and the Equal Opportunity Officer welcome any such feedback as a method of correcting any improper situation. The same officials are readily available to any incumbent employee who feels they should have been treated differently as an applicant for a given position. Beyond that, the SHRA Grievance Policy is available to any eligible internal applicant.

The Office of Human Resources staff includes individuals with disabilities, minorities, females, and veterans. Members of the staff are carefully selected and trained. No person with any identifiable bias is selected or retained for this staff. Each staff member receives continuing orientation and training to ensure commitment to equal employment opportunity goals and objectives, and to be aware of inadvertent bias arising out of procedures or any other source. This affirmative and preventative training extends to all staff members engaged in position evaluation and classification, salary administration, recruitment and selection, promotion, disciplinary and grievance handling, and related processes.

The University will, at appropriate intervals, reexamine the various aspects of its equal employment opportunity efforts. Should any instances of discrimination based on age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, veteran status, or other non-job related factors be discovered in such analyses, or by other available means, corrective action will be taken promptly by the appropriate University officials.

C. Selection

Using methods and procedures consistent with the principles and goals of equal employment opportunity, Employment & Staffing is responsible for the recruitment through the University's applicant tracking system for permanent staff positions. The head of the hiring department or their designee has the final selection authority. The recruitment and selection process complies with all Federal and State laws, regulations and policies and gives equal employment opportunity to all applicants, without regard to age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, or veteran status. The department may view a summary report in the applicant tracking system which includes applicant ethnicity/race and gender data for evaluating total applicants applied versus: 1) total applicants referred and 2) and total applicants interviewed by the department. The final selection decision is made from among the most qualified applicants, which includes applicants with priority consideration, based solely on job-related criteria. Ultimately, the hiring department, in its judgment, selects the best-qualified applicant based on state minimum requirements, and essential and preferred qualifications documented in the position posting. The hiring department in consultation with the Talent Acquisition Partner is accountable for the final selection, consistent with equal opportunity requirements.

In addition, a department needing to fill an opening may consider employees within that department who want to transfer to the open position. Those whose applications meet the State's Minimum Recruitment Standards for the classification of the open position are referred along with any applications of employees in layoff priority, veterans' preference and/or workers' compensation priority status.

After selecting an applicant for hire, the hiring department is responsible for indicating the selected applicant, documenting the selection process and justifying the job-related reasons for the hiring recommendation on the selection document. In addition, the hiring department must also document the specific reasons for non-selection of all other applicants referred, using standard set of non-selection reasons. When complete, the selection document is then forwarded to the designated Talent Acquisition Partner for job offer processing.

The department's assigned Talent Acquisition Partner is available for guidance and assistance to the hiring department at any time during the selection process. Under the direction of the Associate Vice Chancellor for Human Resources, Sr. Director Employment & Staffing, and the Assistant Director, Employment, the Talent Acquisition Partner provides centralized evaluation, consultation and processing to support departmental new hires, promotions, transfers, reassignments, demotions and reinstatements. Acting in coordination with hiring departments, the Talent Acquisition Partner monitors such personnel actions in terms of equal opportunity and advises departments of any apparent legal or policy issue.

Employment & Staffing, in coordination with HR Records & Information, maintains supporting documentation of the recruitment and selection process to provide fact-based information for monitoring and evaluating departmental recruitment and selection practices and procedures. Employment & Staffing maintains records of decisions and recommendations of all University schools, departments, and other units with respect to the hiring and non-selection of permanent staff applicants and the promotion, transfer, and demotion of permanent staff employees, by race and sex for a three-year period. The Office of Human Resources – HR Information Management monitors promotions by race and sex by federal occupation category/job group and reports these annually to the University’s Equal Opportunity Officer.

The role of the Equal Opportunity Officer is to oversee and monitor the implementation and administration of the Plan including the SHRA Employment process, as well as, achievement of placement goals. While the oversight responsibility lies with the Equal Opportunity Officer, the recruitment, hiring and on-boarding process is administered and reviewed by the staff within the Office of Human Resources Employment and Staffing department who have day-to-day responsibility for making employment decisions in the University. Organization and Professional Development manages the new employee orientation program for both SHRA and EHRA Non-Faculty employees. Departments are responsible and accountable together with the Equal Opportunity and Compliance Office, the Office of Human Resources and the University administration for meeting University goals. The Equal Opportunity and Compliance Office provides incumbency and availability data for use with each position opening that reflects, at the initiation of the recruitment, whether the position is under-represented. The Equal Opportunity and Compliance Office works collaboratively with the Employment and Staffing office on recruitment, employment and equal employment related efforts including process improvement, data collection and correction, training and development, outreach, and University programming.

D. Onboarding

All permanent SHRA new employees receive a Conditions of Employment (COE), which outlines the terms and conditions of their job offer. The COE is presented to and signed by the employee on their first day, during new employee orientation. All SHRA new-hires are required to attend a half-day new employee orientation session prior to beginning their work. The classroom-based orientation provides an overview of the programs, history of UNC Chapel Hill, services, policies and benefits offered by the University. Specific benefit information is provided during the benefits review, Q & A and forms collection session.

Temporary SHRA new employees are onboarded by their departments using the online computer-based training located at: <http://new.unc.edu/temps/>. The campus HR representative and/or hiring supervisor or manager utilizes the Orientation Checklist for Supervisors (available on the HR website) and provides information on accounting for time worked, parking, department policies, and other

relevant information to the new temporary employee. Department HR representatives are responsible for ensuring that each university employee completes employment forms and have access to the Equal Employment Opportunity program information. All temporary SHRA new employees receive a Conditions of Employment (COE), which outlines the terms and conditions of their job offer directly from their department. The COE is presented to and signed by the employee on their first day.

E. Job Structuring/Compensation

Classification & Compensation Consultants, under the guidance of the Sr. Director of Classification & Compensation, administer the HR policy and processes covering establishment of new positions and position classifications. In such administration, these departments utilize the State's systems, including the career banding system, and related policies.

OSHR exercises complete and total administrative control of the career banded systems. At this point, the System Office has administrative control. Any changes to the policies or rules go through OSHR, but the day-to-day administration is handled at the System Office. Employment & Staffing and Classification & Compensation receive functional direction, detailed procedures, close monitoring and auditing by the System Office. The University has delegated authority from OSHR to classify most of the state's Career Banded positions and both Classification & Compensation and Employment and Staffing have delegated authority for salary administration of these classes for the actions for which they have responsibility. These processes apply to all State positions subject to the State Human Resources Act at the University. Operating departments are responsible for the assignment of duties and responsibilities to positions at the outset and for changing these as operations require. Departments are required to prepare and submit to the Office of Human Resources a detailed position description on a standardized form and complete organizational chart for each new position request, reclassification request, or update to duties.

Classification & Compensation Consultants provide advice and counsel to departments on position design and the formulation of position descriptions, among other things. A Classification & Compensation Consultant reviews the description and interviews department representatives and supervisors as appropriate for any clarification of responsibilities and additional information needed to assure a fair, equitable and appropriate classification decision. A detailed review is completed by first ensuring that the position's duties meet the OSHR classification specifications and competency profiles. This review determines the job classification only. A review of positions on the organization chart that are in the line of supervisory span and a review of other similarly situated positions on the organizational chart of that particular School/Unit is then conducted. This ensures equitable leveling assignments within that School/Division. Lastly there is a campus wide equity review completed. This entails comparing the requested

position's classification and level to like positions on campus and/or to established University-wide benchmarks.

Following this detailed review, the Classification & Compensation Consultant classifies the position by assigning it to the correct job classification, determining the wage/hour status, and the correct level based on the responsibilities in the description as well as the required competencies needed to complete the duties as assigned by the operating department. The qualifications of any particular employee are not considered in classifying a new position. For reclassifications, incumbents must meet the minimum requirements of the class. Such classification actions are subject to later monitoring and detailed on-site or other audits by OSHR.

When a department manager significantly changes the duties and responsibilities of an existing filled position, s/he is responsible for preparing an updated position description. Here, as in the earlier stages, the Classification & Compensation Consultant provides advice on position design and the writing of the description. Following that, the department is responsible for submitting the description and organizational chart for requesting that a formal classification study of the position be completed. The Classification & Compensation Consultant evaluates the position based on the same three step criteria in which a new position study is conducted and may interview current incumbents as part of the reclassification process.

Departments have the fundamental responsibility for maintaining accurate position descriptions with respect to actual and essential duties required for each position. Positions which have been vacant for more than one year must be resubmitted for a classification review prior to posting to ensure that the level is still appropriate when compared to similar positions. As a complement to department maintenance efforts, Classification & Compensation Consultants and OSHR may initiate studies of position families or classifications at the request of a department. In these studies, the department would be requested to have current position descriptions prepared for all the positions affected and to submit them for evaluation and review. Studies will also be initiated as a result of a directive from the Office of State Human Resources.

F. Training

OHR Organization & Professional Development provides many learning opportunities for all UNC-Chapel Hill employees by coordinating, designing and delivering specialized training programs and organizing development activities for teams. The Professional Development courses are designed to develop and enhance essential workplace skills and increase job effectiveness and improve performance throughout the University. By continuing to develop and strengthen our workforce, UNC-Chapel Hill provides more enriching careers while ensuring that all employees access to training to increase their skills and knowledge.

OHR Organization & Professional Development has also designed a comprehensive

program that addresses core characteristics and skills needed to lead effectively in an academic environment. The University Leadership Education and Development (ULEAD) program develops highly skilled and motivated leaders to meet the challenges of higher education's changing environment. The program is open to 25 applicants from UNC – Chapel Hill, NC Central University and the UNC System Office. Eligibility for the program includes employees with permanent status who supervise at least one lower supervisor or who manages a program that is University-wide or of significant size and complexity.

The OHR Organization & Professional Development Department, in conjunction with Employment & Staffing, provides recruitment and selection training to managers and supervisors on a scheduled basis through such courses as SHRA Hiring: From Posting to Probation, the Blueprint for Engaged Supervision Training (BEST) and other programs.

The department's mission is to provide meaningful learning opportunities that encourage development, stimulate productivity, create a healthier workplace environment and enhance the capabilities of the University's committed and diverse workforce. Available programs address a wide variety of management, supervisory, and employee needs including topics such as Becoming a Team Player, Bringing Out the Best in Others, Change Management, Communication Essentials, Coaching Skills, Effective Decision Making, Emotional Intelligence, How to Receive Criticism and Make it Work for You, Presentations with Pizzazz, and Using Reason to Resolve Conflict.

Courses sponsored by OHR Organization & Professional Development also include a variety of cultural diversity programs, such as Diversity in Hiring, Diversity in the Workplace, and Ethics in the Workplace. All workshops are free to UNC-Chapel Hill staff and faculty, managers and supervisors. Special training is available upon request from hiring departments and selection committees.

All educational and other training programs sponsored by the University are open to qualified employees without regard to age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status. Employees are encouraged to take advantage of these training opportunities advertised through a variety of communications from the Office of Human Resources. In addition, educational leaves may be granted by the University for approved educational programming. Information regarding OHR Organization & Professional Development programs, tuition and fee waivers, and other educational assistance programs, as well as online, technical training opportunities such as Microsoft IT Academy and LinkedIn Learning is available at <https://hr.unc.edu/training/>.

Management Training

Training programs for managers and supervisors are critical to the University's equal opportunity efforts. The Office of Human Resources administers the Blueprint for Engaged Supervision Training (BEST) program, a mandatory program designed to educate and motivate UNC's frontline supervisors on topics including recruiting and interviewing, classification and compensation, performance management and equal employment opportunity policies. The program is a suite of professional development classes and learning opportunities designed to educate and motivate UNC's frontline supervisory team. It is comprised of two required instructor-led and online classes, as well as, the state mandated EEO/DF classes. Participants have three months to complete the mandatory program.

OHR Organization & Professional Development offer additional management-based training including:

- Coaching Skills
- Performance Management & Disciplinary Processes for SHRA Employees
- Foundations of High Performing Teams
- Interviewing Skills for Supervisors
- Fundamental Communication Skills
- Time Management
- Moving from Peer to Manager
- Rewarding and Recognizing Employees
- Managing Interactions with Your Employees
- Conflict Management Skills for the Workplace

Specific and comprehensive training on EEO policies and practices, is also delivered by Equal Opportunity and Compliance Office staff. This training includes:

- The definition of equal employment opportunity;
- The legal basis for equal opportunity;
- Interpreting and applying equal opportunity policies and guidelines;
- Preventing workplace harassment;
- The guidelines for valid and legal selection procedures;
- Identifying and eliminating barriers which can lead to discrimination;

- Implementing the equal employment opportunity program for staff employment;
- Information on the Policy on Prohibited Discrimination, Harassment and Related Misconduct, which includes the established procedures for reporting, investigating, and resolving such matters.

G. Promotion Procedure

The University's staff workforce is highly mobile. The University has formal systems designed to support staff employees seeking upward mobility through transfer or promotion. These systems result in a high level of satisfaction among, and participation by, staff employees. Promotions due to open competitive recruitments during recent years comprised 15-20% of job openings filled each year. For the year ending October 31, 2019, 308 employees were promoted, comprising 20% of the 1,515 openings filled.

The number of promotional opportunities generally depends on fund availability absent any State spending restrictions. Promotional opportunities include upward movement through competitive recruitment, position reclassification or salary range revision, or transfer to another position at a higher salary grade/competency market rate within the same department or by transferring to another department.

H. Performance Management

The University of North Carolina System Office establishes these institutional goals for all employees covered by the University SHRA Performance Appraisal Policy. Supervisors cannot edit or change these goals and must use as written. Regarding the "Compliance & Integrity" level of performance under Institutional Goals, supervisors must evaluate the employees' compliance with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and workplace violence, and all other policies.

Regarding supervisors, they are evaluated on their contributions towards meeting University EO and affirmative action goals. The University of North Carolina System Performance Management Policy states that failure to execute these performance management requirements through the policy will be addressed in their annual appraisal and, as necessary, through application of the SHRA Disciplinary Policy or other applicable corrective process for SHRA or EHRA managers/supervisors.

The overall success of the University relies on the individual accomplishments of all faculty and staff. The Performance Management Program provides a mechanism for communicating responsibilities and evaluating achievements. All permanent University staff are evaluated annually on their performance.

SHRA Performance Management

Performance appraisal information is one consideration in making other personnel decisions such as promotions, disciplinary actions, layoff determinations, and salary increases. Therefore, proper application of the performance management system is essential in the effective application of other personnel policies.

The annual performance cycle runs from April 1 to March 31.

The employee's work plan contains performance goals, development goals and institutional goals. Performance and development goals are set by management for each employee for the performance cycle and organizational values that are set by the Office of Human Resources for all employees. For institutional goals, UNC System Office provides a set of performance expectations that address critical aspects of every employee's overall work product. UNC System Office will provide managers/supervisors with definitions of these goals at the "meeting expectations" level of performance. Work plans must be issued within 60 calendar days of the start of the cycle or the employee's start date. Performance expectations and appraisals are recorded on a standardized form, the Performance Management & Competency Assessment Form.

Employees receive overall annual ratings and individual ratings for performance goals and organizational values on a 3-pt scale (Not Meeting, Meeting, or Exceeding Expectations). Interim reviews are required for all employees near the midpoint of the performance cycle. Employees may appeal an overall rating of "Not Meeting Expectations" on the annual appraisal through the SHRA Grievance Policy.

As part of the career banding system for SHRA permanent employees, supervisors must also conduct an annual Employee Competency Assessment along with the Annual Performance Appraisal. Both are recorded on the Performance Management & Competency Assessment Form.

I. SHRA Hiring & Recruitment Policy

Introduction

The University consistently applies the SHRA recruitment and selection process to promote open and fair competition to select from the most qualified persons to fill vacant positions. Selection decisions will be based solely on job-related criteria. Employment is offered based upon the job-related qualifications of applicants for employment using fair and valid selection criteria and upon satisfactory completion of all relevant reference checks, background checks, credentials verification, and verification of eligibility to work in the United States.

No selection decision shall be made that will constitute unlawful discrimination in violation of State and Federal law. The University will give Equal Employment Opportunity (EEO) to all applicants, without regard to age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation, or veteran status. Preferential treatment will not be given to any private organization or individual based on undue influence.

1. **Recruitment Request**

To initiate recruitment for a vacant SHRA permanent position, departments must submit a posting request through the applicant tracking system. Departments do not need to wait until the position is vacant before submitting the recruitment. However, the hiring supervisor must have received a signed resignation letter or other official documentation of separation date from the current employee.

Each SHRA position has State standards for minimum training and experience. These standards indicate the knowledge, skills, and abilities, or competencies, necessary for successful job performance. Specific formal education may be substituted for required experience in some positions. Directly related experience also may be substituted for certain educational requirements.

Hiring departments are responsible for determining any job-related qualifications required in addition to minimum State standards and for documenting the qualifications based on the Position Description Form (PD102CB). Additional qualifications may be identified as essentials or preferred.

2. **Essential skills** are the required knowledge, skills, and abilities that are critical to a position, without which the duties of the position cannot be performed. Any essential skill listed in the job posting must also be reflected as an essential skill in the position description. A selected candidate must possess all essential skills listed in the job posting of the position for which they are being selected.
3. **Preferred Skills** are the knowledge, skills, and abilities that would aid in successfully performing the primary duties of a position, but are not required. If the hiring department identifies any special physical or mental requirement(s) for an open position, the Office of Human Resources advertises any such requirement(s) in its recruitment. Other training and experience preferences may also be determined by the hiring department; however, there is no substitute for a State-required license, registration, or certification.

4. **Internal Only Recruitment**

With the approval of Employment & Staffing, departments have the option to post SHRA permanent and time-limited positions as internal only. Internal only recruitments limit applicants to current, permanent or time-limited employees of UNC-Chapel Hill or to individuals with UNC-Chapel Hill layoff priority. Internal only recruitments may not be limited to employees of any specific unit, department or division of the University, nor may any of the positions' essential requirements indirectly infer required employment in a specific area of the University.

5. **Posting Requirements**

The Talent Acquisition Partners in the Office of Human Resources must approve the recruitment before the vacancy can be posted. There are three required locations for posting announcements of SHRA position vacancies; State-Wide Posting, University Posting, and Departmental Posting.

State-Wide Posting. The Employment & Staffing Department in the Office of Human Resources provides permanent job openings information to the NC Commerce, Workforce Solutions Division as required by State policy. The posting information includes the State's minimum training and experience requirements and, as appropriate, additional position requirements as defined by the hiring department.

University Posting. The Employment & Staffing Department provides the Staff Openings List of SHRA positions under active recruitment. The list is posted at the Office of Human Resources, Administrative Office Building, 104 Airport Drive. The Staff Permanent Openings List is also updated continuously on the Office of Human Resources website.

Departmental Posting. After the posting request has been approved by the Talent Acquisition Partner, the hiring department prints the "Posting Details" from the online applicant system. State policy requires hiring departments to post conspicuously within the department the "Posting Details" for all of its SHRA vacancies. This internal posting must be concurrent with the posting maintained by the Office of Human Resources and must remain posted in the department through the defined recruitment period's closing date. The hiring department must retain the posting information and recruitment information for three years.

Hiring departments are also responsible for ensuring that department employees currently on extended Military Leave or Family Medical Leave

have been informed in a timely manner of all departmental internal postings.

6. Recruitment Posting Period

The hiring department establishes the length of the posting period in the online applicant system. SHRA permanent or time-limited vacancies must be posted for a minimum of five business days. Direct Hire Temporary posting must be posted for a minimum of three business days. In no case shall a posting close on a day on which the Office of Human Resources is closed for business. The posting period opening and closing dates are included on each job posting. Only applications received no later than 11:59 pm EST/EDST on the closing date may be considered for the position. No employment offer or other commitment can be extended for an open position before the end of the vacancy's posting period. The hiring department may request to extend the posting period as needed by contacting their Talent Acquisition Partner. Extensions to SHRA permanent posting periods must be for at least three business days. The maximum posting period for recruitment is six months from the date of the initial posting; this maximum posting period includes initial recruitment and extensions.

7. Application Submission

In order to apply for an SHRA permanent, time-limited, or direct hire temporary position at the University, all applicants must use the University's online applicant tracking system to:

- Establish an Applicant Profile,
- Complete an Application which includes the applicant's work history, and
- Submit an Application to each individual position for which they wish to be considered no later than the closing time on the position's posted closing date.

Applicants may also attach cover letters and resumes to their applications for specific positions; however, information provided solely on a resume in lieu of an Application for Staff Employment is insufficient for consideration.

Anyone requiring assistance with the online application process may contact the Employment & Staffing Department in the Office of Human Resources.

J. Transfer Opportunities

To promote career advancement and to fill job openings with the best skills available, permanent SHRA (full-time or part-time) employees are eligible to seek transfer to another department or to another position within their current department. There is no requirement for the employee to work in a position for a specified minimum period before applying for a position change.

1. Applicant Referral

The Talent Acquisition Partners in the Office of Human Resources ensure each applicant's training, experience, and skills meet the State minimum recruitment standards and valid job requirements. Only applications meeting these requirements are referred to the hiring department.

Hiring managers (and search committees) can review referred applications through the online applicant tracking system provided by the Office of Human Resources. The hiring department is responsible for further evaluation of referred applications, including reviewing applications for the essential skills listed in the job posting. Applicants who do not have the requisite essential skills as indicated on the job posting cannot be hired into the position.

2. Best Qualified Pool and Interviewing

The hiring department determines which applicants are the best qualified among those referred and then contacts those candidates directly to schedule interviews. Generally, it is expected that hiring departments will interview at least **three** candidates.

Hiring departments cannot interview any candidate whose application was not referred by the Office of Human Resources for the vacancy. Interviews may take place by telephone, Skype, Zoom, or in person, and the interview questions must be applied consistently, regardless of method of contact. All layoff priority applicants must be interviewed for the vacant position, if they meet the essentials and are referred. Hiring supervisors with questions about appropriate interviewing may contact their Talent Acquisition Partner for assistance. In addition, OHR Organizational and Professional Development provides programs on interviewing skills for supervisors on a regular basis.

3. Commitment to Equal Employment Opportunity (EEO)

The University is committed to ensuring that employment decisions are

based on an individuals' competencies and qualifications. Consistent with this principle and applicable laws, the University does not discriminate with respect to employment terms and conditions on the basis of age, color, disability, gender, gender expression, gender identity, genetic information, national origin, race, religion, sex, sexual orientation or veteran status. This policy ensures that only relevant factors are considered and that equitable and consistent standards are applied to all personnel actions. More information and a copy of the University's Equal Employment Opportunity Plan is available on the Equal Opportunity and Compliance Office website: <https://eoc.unc.edu/resources/office-reports/>.

The diversity of our staff brings strength to the University. Our focus on diversity with each search, gives us the opportunity to hire, attract, and retain the talented staff we want and need to continue our legacy of excellence. An online training module located at: https://sakai.unc.edu/access/content/user/cehall/SCT_2/index.htm for Supervisors and Search Committees is available and provides valuable information, helpful advice, and proven techniques to enable our search committees to run more efficiently.

4. **Special Consideration for Applicants with Disabilities**

It is permissible to discuss an accommodation that may be needed and how the applicant would perform the essential functions of the job if one of the following is true: (1) an applicant has an obvious disability, an applicant voluntarily discloses a hidden disability, or an applicant expresses the need for reasonable accommodation.

5. **Pre-Employment Testing**

Pre-employment tests (written, oral, physical, or skills) may be administered by the hiring department with prior approval from the Talent Acquisition Partner assigned to work with the department and the Equal Opportunity and Compliance Office.

6. **Selection and Hiring Proposal**

The Selection and Hiring Proposal form in the applicant tracking system is the official University record of those referred by the Office of Human Resources and the hiring department's selection and non-selection reasons. The School/Division recruitment coordinator uses a set of "Non-Selection Reasons" in the applicant tracking system to record the appropriate reason(s) for non-selection. The Hiring Proposal must be completed before a job offer can be extended to the final

candidate.

K. Disciplinary Processes

1. SHRA Disciplinary Action Policy

Disciplinary processes for SHRA employees are meant to be corrective. Supervisors are strongly encouraged to contact Employee & Management Relations at the onset of any employee performance or conduct issues and to discuss both formal and informal methods for resolving such workplace issues. Employees also are encouraged to contact Employee & Management Relations to discuss ways of resolving workplace issues.

There are three categories of cause for disciplinary action: unsatisfactory job performance, gross and inefficient job performance, and unacceptable personal conduct.

There are four types of disciplinary action: Written Warning, Suspension without Pay (for one or two work weeks), Demotion (of rank and/or pay), and Dismissal.

For unacceptable personal conduct incidents or for grossly inefficient job performance, an employee could be dismissed on a first offense depending upon the severity and pervasiveness of the offense.

Discipline for unsatisfactory job performance is successive and requires at least three disciplinary incidents within an 18-month period of each other: the first incident must result in a written warning, the second incident may result in a written warning, suspension, or demotion, and the third incident may result in a written warning, suspension, demotion or dismissal from employment. Employee & Management Relations is required to review all disciplinary letters before they are issued to employees.

Before any SHRA permanent employee can be suspended, demoted, or dismissed, the supervisor must hold a "pre-disciplinary conference" with the employee to provide the employee an opportunity to address management's concerns before it makes the disciplinary decision. A staff member of Employee & Management Relations must be present at the pre-disciplinary conference.

Temporary and probationary employees are not covered by this policy and its procedures and can be released from employment as deemed appropriate by management after consulting with Employee and Management Relations.

2. **SHRA Probationary Period**

New SHRA permanent and time-limited employees, and those returning to State service after having more than a 31-day break from previous State service, are required to complete a minimum 12-month probationary period. During the probationary period, the supervisor evaluates if the employee is performing at the level required for the position.

Once an employee's 12-month probationary period is satisfied and career status is attained, a new probationary period shall not be required if the employee experiences any of the following changes: promotion; transfer; demotion; reinstatement after leave of absence; layoff priority re-employment with less than a 31-day break in service; reassignment; return of a policy-making/confidential exempt employee to a non-policy-making position. If any of the above changes occurs while an employee is serving a probationary period, the satisfied portion will be credited toward the new assignment. The employee will then be required to complete only the remaining portion of the probationary period. Employees transferring from a local government entity subject to the State Human Resources Act who have already attained career status are not required to serve another probationary period, provided there is no break in service greater than 31 days.

A transferring or former SHRA (SPA) employee who has had a break in service greater than 31 days must serve a new 12-month probationary period before career status is attained. Periods of extended leave of absence with or without pay do not suspend or increase the duration of the probationary period beyond 12 months.

If the supervisor determines that an employee is not able to perform as required for the position, the supervisor can terminate the employee's appointment and must do so prior to the end of the employee's probationary period. The employee must receive written notification of the termination. Supervisors must consult with Employee and Management Relations prior to moving forward with a probationary termination.

Once employees have completed their probationary period, they are protected under the disciplinary procedures found in the Disciplinary Action Policy (SHRA).

L. Pre-disciplinary Action Options

1. Facilitated Conversations

Employee & Management Relations in the Office of Human Resources provides a facilitated conversation program to assist management and employees in productively addressing workplace issues and improving communication and understanding in the workplace.

2. Counseling Sessions

When the supervisor determines that disciplinary action is appropriate for unsatisfactory job performance, a written warning is the first type of disciplinary action that an employee shall receive. However, as referenced in the Performance Management policy, the manager/supervisor shall provide feedback and following the feedback issue a Documented Counseling Session (DCS) prior to beginning disciplinary actions for most performance issues. Any disciplinary action issued for unsatisfactory job performance without a prior DCS must first be approved by the agency HR Director or designee. When a documented counseling session fails to correct employee performance, the manager/supervisor may address the matter by issuing a formal disciplinary action, the first level of which is a written warning.

M. Other Types of Employment Separations

Other than dismissal, a separation from employment may occur when a University employee resigns, retires, is dismissed, separated by reduction in force (layoff), is unavailable for work, or dies. Data is captured as to why individuals leave the University to capture trends and patterns.

1. Resignation

An employee is expected to notify management in writing at least two weeks (10 work- days) prior to the last intended work day of a voluntary resignation. The last day the employee reports to work is normally the separation date.

2. Voluntary Resignation without Notice

When an SHRA employee fails to report to work for a period of at least three consecutive work- days without giving oral or written notice to management, that employee voluntarily terminates his/her employment with (resigns from) the University. The employee does not have appeal rights for this type of separation.

3. **Retirement**

An employee who is participating in the Teachers' and State Employees' Retirement System (TSERS) or the Optional Retirement Plan (ORP) can make application for retirement through Benefits & Leave administration. An application must be filed with the North Carolina Retirement System or Optional Retirement Plan vendor at least one day but not more than 120 days before the effective date of retirement.

4. **Reduction-in-Force (Layoff)**

An employee may be separated by a reduction in force due to budgetary, operational, or organizational needs. Management submits a layoff plan to Employment & Staffing in the Office of Human Resources. In addition to identifying the work unit and employee classification, selection criteria includes the following factors in order:

- 1) University needs
- 2) Type of appointment
- 3) Relative skills, knowledge, and productivity of employees
- 4) Length of total state service
- 5) Workforce diversity

Employees must receive at least a 30-day calendar written notice of the separation. Selected employees may appeal the decision through the SHRA Grievance Policy only if alleging discrimination based on a protected status or if alleging retaliation for making an allegation of harassment or discrimination.

3. **Termination when Leave is Exhausted**

An employee may be terminated from the University if he/she becomes or remains unavailable for work after all applicable leave credits and benefits have been exhausted and management, for sufficient reasons, cannot or does not grant (additional) leave without pay. Employees may appeal the separation through the SHRA Grievance Policy.

N. Grievance Policies

Whenever possible, the University prefers to resolve workplace conflicts informally through discussion or mediation. There are also several different means of formal grievance or appeal at the University, depending on what type of employee you are (SHRA, EHRA Non-Faculty) and the issues being appealed.

1. **Grievances and Formal Appeals**

The University allows SHRA permanent employees to grieve a wide range of issues (see [policy](#) for details). Employees have 15 calendar days to file a grievance from the date of the incident that they are grieving.

Step 1 in the process is mediation between the employee and a representative of the employee's management (usually, the direct or second-level supervisor). If mediation ends in impasse, then the employee may appeal to Step 2, which is a panel hearing. The employee and a representative of the employee's management (usually, the direct or second-level supervisor) present their information to a panel of three volunteer SHRA permanent employees.

The panel reviews the materials presented and writes a report and recommendation to the Chancellor, who then makes the final decision for the University on the issue. Certain issues can be appealed to the State's Office of Administrative Hearings after the completion of the internal process (see policy for details <https://hr.unc.edu/employees/policies/>).

By State regulation, the grievant cannot be represented by an attorney during the internal process. The Office of Human Resources provides guideline documents to assist employees through the process. For matters appealed to the State's Office of Administrative Hearings, the grievant is allowed to retain counsel at their own expense.

Grievances that allege prohibited harassment, discrimination, or retaliation due to allegations of discrimination or harassment go through a preliminary equal opportunity informal inquiry (administrative review) prior to Step 1 mediation.

2. **SHRA Performance Appeals**

The University allows SHRA permanent employees to appeal overall ratings of "Not Meeting Expectations" on their annual performance appraisals. Mid-cycle reviews and individual ratings on performance goal or organizational values ratings on the annual appraisal are not appealable. Performance appraisal appeals are administered through the SHRA Grievance Policy.

3. **Administrative Review for Discrimination/Harassment Complaints**

Employees are urged to file complaints within 180 calendar days of the most recent event of alleged prohibited harassment or discrimination;

however, to preserve grievance rights for the issue, the employee must file the complaint within 15 calendar days of the event.

O. Internal Monitoring, Evaluation and Auditing System

Responsibility for compiling and monitoring the University's equal opportunity progress is done in collaboration between the Equal Opportunity and Compliance Office, and Office of Human Resources, Employment & Staffing and/or HR Business Analysis units as follows:

- The Talent Acquisition Partner provides ongoing monitoring of department underrepresentation during the SHRA permanent and time-limited posting, hiring and selection process via the applicant tracking system. Specifically, to indicate underrepresentation of minorities and females by federal occupation/job group and department.
- The Talent Acquisition Partner provides department consultations based on SHRA permanent and time-limited Workforce Profile data where underrepresentation is found. Focus is placed on targeted advertising and outreach efforts to increase candidate pools in the underrepresented demographic.
- The Talent Acquisition Partner audits the SHRA permanent and time-limited Hiring Proposal and Selection Document for each recruitment to ensure that an appropriate justification is provided in relation to recruitments with documented underrepresentation of minorities and females.
- The HR Business Analysts annually report recruitment and promotion activity, openings filled, internal transfers and terminations by race, sex and federal occupation category/job group and action reason for review by the Equal Opportunity and Compliance Office.
- Upon request, assists the Equal Opportunity Officer to respond to reviews by the Office of Federal Contract Compliance Programs, U.S. Department of Labor and other federal offices.

XIII. Harassment Prevention Strategies

The University is “committed to the highest degree of integrity in fulfilling the University’s mission, in upholding the dignity of individuals, and in advancing the common good of our community” and in doing so the harassment prevention strategies are woven throughout all equal employment opportunity programs by way of:

- EO related policies and procedures

- Policy Statement on Non-Discrimination
- Policy on Prohibited Discrimination, Harassment and Related Misconduct
- Policy on Non-Discrimination for Visitors and Program Participants
- ADA Reasonable Accommodations for Employees, Applicants and Visitors Policy
- Policy on Religious Accommodation
- Policy on Pregnant and Parenting Student & Applicants
- Formal and Informal EEO Related Training Programs
 - Mandatory Training including Responsible Employee/Campus Security Authority (CSA) and Title IX Awareness and Violence Prevention
 - Equal Employment Opportunities and Diversity Fundamentals (EEODF)
 - Mandatory Harassment and Discrimination Prevention Training
- Education, Training, and Awareness Programs”
 - Delta Advocates
 - Empowering Carolina
 - HAVEN – Sexual Assault and Interpersonal (Relationship) Violence
 - Heels United for a Safe Carolina
 - Tarheel Tribute – To Veterans
 - See Training Section for full list
- Performance Management Expectations and Accountability
- Communication of and Accessibility to EEO Policies and Procedures and Incident Reporting options
- Ethics and Integrity at Carolina Portal

XIV. Layoff (Reduction-In-Force) Guidelines (SHRA)

The layoff procedure assures equitable treatment of SHRA employees when reduction-in-force becomes necessary. A layoff might become necessary because of a reduction in work or funds, abolishment of a position, or other material change in duties or organization. A layoff decision should be reached only after other applicable measures have been explored, including but not limited to such actions as: placing the employee

into the same or lower role/competency level in the same job family; delaying the filling of or elimination of vacant positions; limits on purchasing and travel; retraining of employees in needed skill sets; or job sharing and work schedule alternatives.

A. **Covered Employees**

This policy applies to SHRA career status employees (full-time and part-time) holding permanent appointments.

The following types of SHRA employees may be separated without following the layoff procedures of this policy: SHRA temporary employees, SHRA employees within their probationary periods and SHRA employees in time-limited permanent appointments.

Although this policy does not apply to EHRA and student appointments, departments should consider all staffing resources when determining positions to retain.

B. **Procedures**

A layoff decision requires a thorough evaluation of the need for specific positions and the relative efficiency of affected employees so that the University can provide the highest level of service possible with a smaller work force. The decision to layoff a particular employee or group of employees rests with the management overseeing the affected work unit(s).

Work unit: The work unit is a formally established and recognized unit, section, division, or department of the University in which employees perform a closely related set of functions or duties.

The department determines which employees shall be laid off by applying the following factors in order:

1. **University needs.** Consider the continuing work to be performed by the work unit(s) and the number of positions in each branch, role, and competency level necessary to perform the continuing work. Once the position(s) to eliminate have been identified, management must consider all employees in positions with the same or related classification. "Same or related" classification means positions in the identified branch, role, and competency level. In order to identify the affected employees, apply the remaining guidelines.
2. **Type of appointment.** Temporary employees performing work comparable to work in the same or related classification must be terminated before any employee with a permanent appointment, provided that a

permanent employee has the skills to perform the temporary employee's tasks. Employees with time limited or probationary appointments as well as trainees with less than six months of service must be terminated before any employee in the same or related SHRA classification with a permanent appointment, provided that the permanent employee has the skills to perform the tasks of the probationary employee or trainee.

3. **Relative skills, knowledge, and productivity of employees.** Employees to be retained must demonstrate the skills and knowledge required for the continuing work of the work unit or be able to attain those skills and knowledge within a reasonable period of time in accordance with the operational needs of the work unit. Selection must be consistent with the employee's most recent annual performance review and employee competency assessment, as well as, other relevant documentation.
4. **Length of total state service of employees.** Length of service shall be considered but may receive less weight in the determination. Eligible veterans must be accorded one year of state service for each year (or fraction thereof) of military service, up to a maximum of five years of credit.
5. **Workforce diversity.** In accordance with federal guidelines affecting equal employment opportunity, any application of the layoff policy must be reviewed by the affected department(s) and the Office of Human Resources to determine its impact on the workforce diversity within the work unit(s).

Department management is accountable for documenting the basis for its decision in a manner that clearly demonstrates reasonable and consistent application of these factors. The Talent Acquisition Partners in the Office of Human Resources provide consultation to department management regarding the effective application and interpretation of the Office of State Human Resources Reduction in Force Guidelines. The Talent Acquisition Partners analyze the applicable factors, perform an adverse impact analysis and if all criteria are met, work with the System Office and the Office of State Human Resources to seek approval of the layoff.

After the SHRA Layoff Request has been fully approved by OHR, System Office and OSHR and at least 30 calendar days before the effective date of the layoff, the director or department head must provide the following information, in writing, to the employee(s): the reason for the layoff; effective date of the layoff; notification that OHR will contact them to arrange for a layoff information session, including details on the University's policy on priority re-employment; completion of necessary forms; availability of aid in seeking other employment; eligibility to apply for unemployment insurance benefits; other benefits information for separating employees; the estimated amount of severance pay being requested, if any; and the SHRA Grievance Policy.

XV. Equal Employment Opportunity Planning

A. Workforce/Labor Force Analysis

The University's SHRA Job Group Analysis is reported by race, sex and disability status as of October 31, 2019.¹

Comparison of Incumbency to Availability is calculated using the Two Standard Deviation Method with incumbency source data from the University of North Carolina at Chapel Hill's ConnectCarolina system. The 2010 U.S. Census occupation data by race and sex was used to identify the percentage of minorities and females in the SHRA Incumbency v. Estimated Availability Analysis reports² as of October 31, 2019 compared to Recruitment Area Availability (Alamance, Chatham, Durham, Orange and Wake counties).

The University's recruitment area has experienced an increase in terms of population growth. The civilian labor force estimates³ for the five counties in 2010 totaled 800,661 persons, and in 2019 it totaled 980,532 persons, a 22.5% percent increase.

These factors may reflect a change in the SHRA workforce/availability analysis. The availability data for the recruitment area is adjusted for the number of qualified employees in each race and sex category that are considered promotable, transferable, and trainable within the organization to determine the recruitment area availability.

The comparison of the Staff Job Group Analysis to the recruitment area Estimated Availability is the basis for setting hiring objectives (Annual Placement Goals) by occupation category/JCAT/job group (see attached UNC JCAT and Crosswalk.) Hiring objectives are reviewed with departments when the availability percentage for the respective category exceeds the University's employment of minorities or females and when job openings are projected to become available during the period of the **Plan**. Any data arranged by the job group is presented to measure progress towards the University's commitment and for compliance with federal requirements. In addition, the evaluation of progress or determination of trends is critical to defining the need for corrective action.

B. Job Opening Estimates

Job opening projections take into account the University data on SHRA permanent

¹ Report #1 SHRA Job Group Analysis

² Report #2 Incumbency v. Estimated Availability Analysis

³ North Carolina Civilian Labor Force Estimates – Not Seasonally Adjusted – NC Dept. of Comm. Labor & Economic Analysis Division

staff openings filled as of October 31, 2019. SHRA permanent openings filled for each of the last five years totaled, as follows:

<u>Year</u>	<u>Openings Filled</u>
2019	1515
2018	1,242
2017	1,337
2016	1,498
2015	1,291

These openings were filled by promotions, lateral transfers, and new hires. In addition to the 830 new hires, the University processed 308 promotions and 377 transfers.

C. Identification and Correction of Issues

Fluctuations in the number of openings filled each year can be attributed to changes in State-appropriated and Federal research funding, and employee terminations. In the past, SHRA employee terminations have remained less than 20% of the SHRA staff workforce, however, the numbers still significantly impact campus. Terminations for SHRA employees totaled 862, which equaled 13% of the staff workforce and a decrease from the previous year. For the previous four years SHRA staff terminations totaled 826 in 2018, 819 in 2017, 979 in 2016, and 931 in 2015.

Retention is impeded by the State’s noncompetitive pay program and benefits package. Without a competitive pay policy adapted to the unique realities of this geographic labor market, the University likely will continue to experience difficulty in the recruitment and retention of qualified persons of any race, sex, veteran or disability status.

The University continues to expand its outreach and recruitment efforts to increase the number of minority, female, individuals with disabilities and veterans in the applicant pools. See Posting and Advertising Permanent Staff Position Openings (pg. 32) and the EEO Quantitative Analysis Form (attachment #4) for further details.

D. Attainment of Previous Year Placement Goals

Numerous circumstances can impact workforce projections by race, sex and job group so that these are not always precise. The number of new positions that might be established and turnover in this dynamic labor market cause such projections to be estimates. In this context, percentage workforce goals to which the University is

committed have been set where minorities and/or females are shown, by availability, to be under-represented in the University's workforce. The objective or "goal" is established to make good faith efforts that would result in an increase in the number of minorities or women in the workplace that equals or exceeds the number of minorities or women that are estimated to be available to work within the identified positions. These goals are shown in the **Plan's** Report #2 Incumbency v. Availability Analysis, Report #3 Placement Goals, Attachment #5 OSHRA's Job Opening Estimates for Occupations in Which Underutilization Occurs, as of October 31, 2019. The percentage goals reflect the percent availability for the respective under-represented group in the respective job group. No goal is shown where the University's staff workforce in the respective job group already exceeds availability as identified by the availability study.

It is important to note that OSHR's EEO Quantitative Analysis Form is completed based on the annual increase of permanent SHRA openings filled via promotions, transfers and promotions. The 2020 Job Opening Estimates for Occupations in Which Underutilization Occurs Form reflects an estimated 1515 openings filled for the identified underutilized job groups.

Based on an analysis of 2019 and 2020 EO Plan SHRA Placement Goals, the **Plan** reflects new and continued Placement Goals as follows:

Minorities in Job Groups

- 4D –Fiscal Affairs Prof.
- 4E - External Affairs & Comm. Prof.
- 5B – Admin./Office Support Spv.
- 6A – Institutional Tech/Paraprof.
- 6B – Technology Tech/Paraprof.
- 6C – Research/Lab Tech/Paraprof.
- 6F - Environment Tech/ Paraprof.
- 7B – Skilled Craftsperson

Women in Job Groups

- 4G – Information Tech Prof.
- 4L – Athletic Affairs Prof.
- 5A – Administrative/ Office Sup. Mgr
- 6F - Environment Tech/ Paraprof.
- 7B - Skilled Craftsperson
- 8B – Service/Maintenance Staff

See Attachment 1 for the UNC System Office Job Group Listings and Job Group/Occupational Classifications Crosswalk.

XVI. Specific Provisions Regarding Equal Employment Opportunity for Individuals with Disabilities and Protected Veterans

A. Purpose

The Staff Equal Employment Opportunity Program for Individuals with Disabilities and Protected Veterans serves as a working document for taking affirmative action to employ and advance in employment qualified individuals with disabilities and protected veterans. In general, provisions that are unique for ensuring equal employment opportunities for individuals with disabilities and protected veterans are set forth in this section. In some instances when general provisions governing equal employment opportunity action encompass women, minorities, individuals with disabilities, and protected veterans, the provisions appear in early section of the Equal Employment Opportunity Plan.

The U.S. Department of Labor's Office of Federal Contract Compliance Programs published a Final Rule in the Federal Register that makes changes to the regulations implementing the Vietnam Era Veterans' Readjustment Assistance Act, as amended (VEVRAA) at 41 CFR Part 60-300, and Section 503 of the Rehabilitation Act of 1973, as amended (Section 503) at 41 CFR Part 60-741, effective March 24, 2014. The changes were enacted to strengthen the provisions of the regulations to aid contractors in their efforts to effectively recruit, hire, and retain protected veterans and individuals with disabilities. In conformance with the changes to the federal regulations for protected veterans and individuals with disabilities; the University of North Carolina has an obligation to set an annual benchmark for veterans and utilization goals for individuals with disabilities that serve as an equal opportunity objective. The University will apply good faith efforts to make these objectives attainable.

While current federal regulations have established an employment objective for protected veterans, based on the Vietnam Era Veterans' Readjustment Assistance Act (VEVRAA), which equals a benchmark of 5.9% for protected veterans for the 2020 State EEO Plan. In addition, federal regulations also established a utilization goal for qualified Individuals with Disability of 7.0% based on Section 503 of the Rehabilitation Act.

The University continued its efforts to increase the self-identification of individuals with disabilities by providing training to employees with current and clear information regarding the definition of an individual with a disability, and its relation to self-identification, specifically the University's need, use, and confidentiality of the data. The initiative has helped to increase self-identification of disability status for permanent SHRA employees.

The University also launched the "Count Me In" Campaign during the April 2019 Empowering Carolina event. This campaign was developed to promote the

voluntary self-identification of individuals with disabilities. The University has made significant progress towards increasing the total number of employees that have self-identified. During the applicable period, the University reached its highest recorded disability self-identification rate for SHRA employees, 6.64%.

Both the hiring benchmark and utilization goal serve as quantifiable methods by which the University can measure the progress and effectiveness of our veteran and individuals with disabilities outreach, recruitment, and equal opportunity efforts.

B. Policy Statement

The University of North Carolina will not discriminate against any employee or applicant for employment because of a physical or mental disability or because he or she is a protected veteran in regard to any position for which the employee or applicant for employment is otherwise qualified. The University agrees to take affirmative action to employ, advance in employment, and otherwise treat qualified individuals with disabilities and qualified veterans without discrimination based upon their disability or veteran's status in all employment practices. The University will recruit, hire, train, and promote persons in all job titles, and ensure that all other employment actions are administered, without regard to disability or veteran's status; and ensure that all employment decisions are based only on valid job requirements.

In furtherance of this policy, the University prohibits retaliatory action against any employee or applicant for employment who makes a charge of employment discrimination, testifies, assists, or participates in any manner at a hearing, proceeding, or investigation of discrimination in an employment complaint.

C. Review of Employment Processes

The University of North Carolina at Chapel Hill has reviewed its employment processes and determined that its present procedures are careful, thorough, and systematic in their consideration of the job qualifications of applicants and employees who are qualified veterans and individuals with disabilities. Job analysis is typically necessary only when there is a change in the duties and responsibilities that impact the qualifications and competencies required, such as for positions with low turnover. However, if the need arises the University analyzes specific job qualifications to ensure that the qualification requirements do not tend to screen out individuals with disabilities or qualified veterans. This analysis is completed on an individual basis should an individual with disabilities or qualified veterans be excluded from an open position. All qualification requirements approved by the University are job-related or consistent with business necessity and the safe performance of the job.

D. Review of Physical and Mental Qualifications

The University reviews the physical and mental job qualification standards to ensure that, to the extent qualifications standards tend to screen out qualified individuals with disabilities or qualified protected veterans, they are job related for the position in question and are consistent with business necessity. All qualification requirements approved are job related or consistent with business necessity and the safe performance of the job.

E. Reasonable Accommodation to Physical and Mental Limitations

Per the ADA Reasonable Accommodations in Employment Policy, the University makes reasonable efforts to accommodate individuals with disabilities unless to do so would impose an undue hardship or change the essential functions of the position. The Equal Opportunity and Compliance Office, in consultation with other University offices, is responsible for ensuring that appropriate accommodations are available for employees or applicants for employment who self-identify.

F. Harassment Prevention

The University has procedures to ensure that its employees with disabilities are not harassed because of their disability. Employees with complaints alleging discrimination because of his/her disability and/or veterans' status are encouraged to utilize the Policy on Prohibited Discrimination, Harassment and Related Misconduct and grievance procedure(s) currently in effect in the University.

Faculty, staff and/or applicants should address their concerns to:

Equal Opportunity and Compliance Office
214 West Cameron Ave, CB #9160
Chapel Hill, NC 27599
(919) 966-3576

Or to:
Employment & Management Relations
104 Airport Drive, CB #1045
Chapel Hill, NC 27599
(919) 843-3444

G. External Dissemination of the Policy

The University undertakes appropriate outreach and positive recruitment activities. All recruiting sources, including state employment agencies, state vocational rehabilitation agencies, organizations of or for individuals with disabilities and veteran service organizations are informed of the University's policy concerning the employment of qualified individuals with disabilities and qualified protected veterans and have been advised to actively recruit and refer qualified persons for job opportunities.

H. Internal Dissemination of the Policy

The University disseminates this policy internally as follows:

1. All employees are advised annually of the University's policy and encouraged to support it;
2. Inform all employees and prospective employees of its commitment to engage in equal employment opportunity to increase employment opportunities for qualified individuals with disabilities and qualified protected veterans. The policy is included in employee orientation and management training programs; and
3. Applicants and employees who believe they are qualified individuals with a disability, or who are a qualified protected veteran are invited to identify themselves if they wish to benefit under the equal employment opportunity program.

I. Audit and Reporting System

The University has designed and implemented an audit and reporting system that will:

1. Measure the effectiveness of the university's equal employment opportunity program;
2. Indicate any need for remedial action;
3. Determine the degree to which the university's objectives have been attained;
4. Determine whether employees identified as persons with a disability and qualified protected veterans have had an opportunity to participate in all university sponsored educational, training, recreational, and social events;
5. Establish and communicate hiring objectives when the population of veterans and individuals with disabilities in a job group is significantly less than the hiring benchmark;
6. Measure the University's compliance with the equal employment opportunity program's specific obligations and;
7. Take necessary action to bring the program into compliance where the program is found to be deficient.

J. Responsibility for Implementation

The Equal Opportunity and Compliance Office has overall responsibility for implementation of the University's equal opportunity and affirmative action programs. University senior administrators, supervisors, and managers share responsibility for implementation of the Plan.

K. Training

All personnel involved in the recruitment, screening, selection, promotion, disciplinary, and related processes shall be trained to ensure that the commitments in the University's Plan and programs are implemented.

L. Outreach

It is the University of North Carolina at Chapel Hill's intention to establish appropriate hiring objectives in order to improve the representation of veterans and individuals with disabilities where disparities exist. Continued outreach activities for employees include the following:

- Posting the Staff Openings List daily on the on-line application system (People Admin) at www.jobs.unc.edu.
- Briefing sessions held with recruiting sources;
- Participating in Career Day programs offered at community colleges and technical schools, or at Job/Career Fairs sponsored by recruiting sources, community organizations, and other area employers;
- Periodically contacting community organizations such as the Division of Employment Security, and Orange County Chamber of Commerce, as well as organizations for veterans and individuals with disabilities.
- Periodically contacting and meeting with representatives from leading Black, Hispanic, American Indian, and Women's organizations in the University's recruitment area (Alamance, Chatham, Durham, Orange and Wake counties);
- Attending and networking at professional meetings including Chamber of Commerce and Triangle Industry Liaison Group (TILG) meetings;
- Providing the www.jobs.unc.edu URL to other agencies, such as the Division of Employment Security, the University of North Carolina-General Administration, and the Office of State Human Resources to establish links between the websites.
- Providing collateral materials such as a recruitment tri-fold and marketing items to agencies, minority groups, and community organizations.
- Placing advertisements, as appropriate, in diversity recruiting sources such as the Diverse Issues in Higher Education and the INSIGHT into Diversity, as well as widely circulated daily newspapers such as the News and Observer, Durham Herald/Sun, and Burlington Times; cross-posting on Monster.com and Careerbuilder.com partner diversity sites;

- Contacting Business Relations Representative from the NC Division of Vocational Rehabilitation Orange, Chatham, and Lee Counties to develop a referral and follow-up process for applicants from this program. Maintain regular contacts with other representatives of vocational rehabilitation.
- Continued contact with additional representatives of vocational rehabilitation offices.

SHRA EEO PLAN WORKFORCE REPORTS – Data as of October 31, 2019

Report # 1 – SHRA Job Group Analysis

Report # 2 - SHRA Incumbency v. Availability Analysis

Report # 3 - SHRA Placement Goals

Report # 4 – SHRA Workforce Analysis

SHRA EEO PLAN ATTACHMENTS

- #1. Occupational Classifications – UNC System Office Job Group Classifications and Crosswalk
- #2. Race and Ethnicity Descriptions
- #3. Statistical Evaluation (Employment Activity)
- #4. EEO Quantitative Analysis Form
- #5. Job Openings Estimate Form
- #6. OSHR Reduction in Force Policy