INTRODUCTION

In June 2014, all schools and academic units were asked to appoint an Equity Advisor who would take leadership on matters of equity, diversity, and inclusion within their institution. Distributed throughout the University, these Equity Advisors leverage their direct experience with local culture and climate to advise their deans in strategy, policy, training, climate, and accountability.

Roles and responsibilities are still evolving; however, many Equity Advisors already play a concrete role in faculty training, monitoring the faculty search and other hiring processes, and consulting on matters of pay equity. Although Equity Advisors report directly to their deans, they also work closely with and provide invaluable advice to the Vice Chancellor for Equity, Diversity and Inclusion (“VC-EDI”). They constitute the most important advisory council for the Office of Equity, Diversity and Inclusion (“OVC-EDI”).

Notwithstanding their importance to the OVC-EDI, questions often arise concerning Equity Advisors’ precise roles, responsibilities, authority, and compensation. This memorandum is intended to answer those questions. Specifically, this memorandum outlines:

- the expectations for all Equity Advisors, and
- the compensation faculty/staff receive for their service as an Equity Advisor.

In the interest of increasing clarity and transparency, this policy memorandum will be periodically updated. Equity Advisors will be notified of updates, and the most current version, including a changelog, will always be available at the OVC-EDI website: <https://equity.ucla.edu/about-us/our-teams/equity-advisors/>.

I. EQUITY ADVISOR EXPECTATIONS

The core function of the Equity Advisor is to serve as a focal point for strategy, policy, and practice related to increasing diversity and fostering and maintaining a climate of inclusion within the school/division. The following falls under the purview of an Equity Advisor:
• Assisting the dean in developing strategic plans related to diversifying the faculty, staff, and student body.

• Overseeing and reporting on the faculty and graduate student recruitment processes to increase diversity within the academic unit.

• Helping to foster an inclusive, respectful environment for all faculty, staff, and students in the academic unit.

• Acting as a resource and strategic liaison to the Vice Chancellor for Equity, Diversity and Inclusion.

Given the foregoing, Equity Advisors are expected to engage in the following activities:

Participate

1. attend at least 75% of the Equity Advisor meetings (unless the VC-EDI is informed of unusual circumstances);

Receive training

2. attend training by OVC-EDI staff about the faculty search process;

3. attend training by OVC-EDI staff on data dashboards (what the dashboards mean, definitions of fields, how to display different data);

4. attend Sexual Harassment Prevention Training;

5. once established, attend Discrimination Prevention Training facilitated by the Discrimination Prevention Office.

6. attend Intergroup Dialogue Facilitators Training;

Check faculty hiring (assuming your school/division hires faculty)

7. work with department chairs and faculty search committees to develop more inclusive position announcements, advertising, and advertising sources;

8. develop practices for improving faculty recruitment with the school/division to enable a more diverse faculty;
9. be a mandatory reviewer in the UC Recruit queue\(^1\) (at Search Plan, Applicant Pool Report, and Shortlist Report stages prior to submission to chair, dean, VC-EDI, or Academic Personnel Office);

10. be consulted and review all waiver requests from Deans (Deans should certify that the Equity Advisor has reviewed and indicate whether the Equity Advisor approves of the waiver request in their request to the VC-EDI);

11. provide Faculty Search Briefings on equitable search practices for faculty in your school or division who are unable to attend the public briefings;

12. review list of President’s Postdoctoral Fellowship Program (PPFP)/Chancellor’s Postdoctoral Fellowship Program (CPFP) fellows to identify potential hiring matches for your school/division;

**Promote Faculty Advancement and Retention**

13. consult with new faculty members to assess needs for acclimatization and advancement;

14. work with deans and department chairs to develop or improve mentoring and professional development for all faculty members within the department;

15. ensure that information and resources for work/life balance, time off the clock and family or health-related leaves are available to all faculty;

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\(^1\) The Equity Advisor must (a) review and (b) indicate approval or disapproval at the following three stages of the search process: (1) the Search Plan, (2) Applicant Pool Report, (3) Shortlist Report. To be clear, even where the Equity Advisor does not approve the Search Plan, Applicant Pool Report, or Shortlist Report, the search may proceed if each subsequent reviewer (i.e., chair, dean, VC-EDI) approves the search. In such cases, which will likely be infrequent, the Equity Advisor should note, in the appropriate field in UC Recruit, why the EA believes the search should not proceed. The VC-EDI will consider this explanation when determining whether to permit the search to proceed.

Note: given UC Recruit’s current functionality, searches might need to list the Equity Advisor as an “optional” reviewer. This characterization should not be read to mean that review by an Equity Advisor is optional.
16. work with the chair or dean to ensure equity in advancement and retention (to include evaluating the progress of ladder faculty; identifying those making less than normal progress; providing mentoring, resources and other assistance to enable development and progress);

17. assist faculty in effectively presenting diversity-related research, teaching, and service per APM 210 in merit/promotion cases (to include assisting dean, chairs, and departments to incorporate equitable evaluation of diversity-related research, teaching and service in the review process);

18. raise awareness of the need for equity and diversity in honors and awards;

19. mentor, advise and support colleagues on seeking leadership opportunities, including the opportunity to become an equity advisor;

Promote Graduate Student Admission and Advancement

20. consult with the graduate admissions committee to: 1) confirm that diversity is being considered and that proactive practices are used for recruiting and selecting new graduate students, 2) follow-up regarding specific student admission cases as necessary, and 3) request additional admissions allocations to increase diversity;

21. discuss equitable selection practices and implicit bias with graduate admissions committees within the school/division;

22. provide assistance to the academic unit: 1) to make sure qualified students are nominated for diversity fellowships, 2) to encourage faculty participation in the fellowship committee, and 3) to bring to the attention of the chair/dean such opportunities as may arise to secure outside funding for graduate student support from funding organizations, private foundations, etc.;

23. review and report on the demographic diversity of the availability pool, the applicant pool, the admitted pool, and the graduate students in the academic unit (when necessary, work with the academic unit to make improvements);
24. be a resource to the chair/dean to best ensure that all graduate students are making adequate progress and receiving the attention they need (when necessary, work with the academic unit to resolve any issues);

**Improve climate**

25. review past department 8-year reviews and follow-up on diversity-related issues;

26. work with department chairs to implement programs and practices to address issues (to include assisting chair or dean with tracking department progress in correcting diversity and climate issues);

27. assess the local climate or other diversity-related issues;

28. assist chair or dean in establishing action plans;

29. advertise to students and staff your role and function;

30. proactively share with faculty, staff, and students the work that OVC-EDI -- including the Discrimination Prevention Office, the Title IX Office, and BruinX -- is doing;

31. host at least one equity, diversity, and inclusion related program or workshop per quarter (could be a lunch, conversation, town-hall, speaker);

32. provide information to faculty, staff, and students in the academic unit regarding ways to report complaints of discrimination, harassment, and retaliation;

33. assist with informal resolutions of discrimination-related complaints;

**Share expertise**

34. support fellow Equity Advisors (to include, for instance, providing training or programming, based on experience or expertise, across units);
Help in selection processes

35. help review grant and funding applications, as appropriate.

II. EQUITY ADVISOR COMPENSATION

The role of Equity Advisor can be time-consuming and arduous. Those who fulfill this role should be recognized and compensated for their efforts. For their time and service, the OVC-EDI provides Equity Advisors with $6,000 annually. These funds will be distributed in the form of a stipend or, depending on the particular division/school and Equity Advisor, other appropriate disbursement—e.g., to augment research funds. In addition, the OVC-EDI makes available $4,000 of annual funding for programming and other costs related to events and functions connected with equity, diversity, and inclusion.

Equity Advisors will be asked annually to submit a brief account of how they used the programming funds, and to what effect. If all funds have not been used, the remainder can be rolled over. However, that remainder will be capped at a cumulative maximum of $2,000.

These amounts will be prorated as a function of time and number of advisors per school or division:

- If the School/Division has more than one Equity Advisor, the stipend will be split equally, unless otherwise indicated.

- The stipend will be prorated according to the month of appointment in the relevant Academic Year. (For example, an Equity Advisor appointed in March 2016 will receive one-third of the designated stipend amount for the 2015-2016 Academic Year.)

Any funding that the OVC-EDI allocates for the Equity Advisor position is not intended to replace negotiated compensation made at the department or division levels. Equity Advisors should continue to receive credit through all appropriate measures, including local resources, in a manner proportional to their efforts and achievements. Promoting an equal learning and working environment falls upon all of us, and we must each bear those costs.
At the end of the academic year, the VC-EDI will ask for an accounting of the work that each faculty/staff member accomplished in their capacity as Equity Advisor.

CONCLUSION

This policy memorandum is intended to provide clear and consistent information about Equity Advisor expectations and compensation. If you have additional questions, please do not hesitate to contact the OVC-EDI.

All inquiries should be directed to Brandie Kirkpatrick at 310-206-7411, or bkirkpatrick@conet.ucla.edu. We welcome your thoughts and feedback. Thank you for your cooperation.