Step-by-Step CRC Appointment Guide
(previously Appointments Checklist)

This guide is designed as a step-by-step guide for a Canada Research Chair search and appointment at UBC, designed to fulfil the requirements of the CRC Program and UBC's CRC Equity, Diversity, and Inclusion Action Plan. It describes the necessary steps to enable departmental search committee chairs to complete the *Attestation – Recruitment & Nomination Process Form* and attest to the integrity of the process and adherence to the requirements.

Please review this CRC Appointment Guide in its entirety before beginning your search process because the CRC Program (CRCP) nominations process has changed. Until further notice, nominations to the CRCP are restricted to individuals who self-identify as belonging to one or more of the federally designated equity groups to redress the imbalance of representation within the CRCP.

The Tri-Agency Institutional Programs Secretariat (TIPS) reserves the right to ask institutions to provide, at any time within 48 months following a nomination submission, the documentation that demonstrates that the requirements have been met.

I.   Prior to Active Recruitment

1) Analyze your Faculty's needs with respect to diversity amongst your current CRC Tier 1 and 2 chairholders by contacting UBC's CRC Secretariat at ubcvpao-g-ubccrc@mail.ubc.ca. Consider under-explored or under-examined areas of research, learning, and knowledge within the relevant disciplines.

2) Further to our previous communication regarding changes to the CRCP requirements from Ottawa, please be advised that with the **2019 Addendum to the 2006 Canadian Human Rights Settlement Agreement**, new employment equity targets were established in the spring of 2021, and are subject to change. These targets are to be met incrementally until 2029, and are based on the 2016 and 2019 Canadian Workforce Availability data and the result of a 2021 Canadian Human Rights Settlement Agreement. For UBC, as a large institution, the targets have been disaggregated for Tier 1 and Tier 2 chairs. For additional information about the 2019 Addendum, its implementation and the Program's current equity, diversity and inclusion (EDI) measures, please see the frequently asked questions.

3) When filling a chair, you must consider the need to meet and sustain the equity and diversity targets to address the underrepresentation of chairholders from the Federally Designated Groups (FDGs): which include persons with disabilities, Indigenous Peoples, women and gender minorities (transgender, gender-fluid, nonbinary and Two-Spirit people), and racialized minorities. (See: June 2021 representation in the CRCP and the 2029 targets). Consider the intersectionality of identities in discussing CRC positions.

4) **Please note**: in accordance with the latest CRCP directive, institutions found not to have met their equity target or targets at any of the given equity target deadlines leading up to 2029 are limited to submitting new nominations from individuals self-identifying as belonging to one or more of the FDGs, until their equity target gap or gaps for that deadline is met. All renewals can continue to be submitted during this time. Institutions that do not meet their equity targets by the December 2029 deadline will see their total allocation of chairs reduced for an extended period of time. The exact methodology to be used will be shared with institutions prior to 2023.

5) **It is essential that the language provided in this guide be used in your position advertisements to ensure that all potential candidates are aware that these positions are restricted to candidates self-identifying as belonging to one of the federally designated equity groups: persons with disabilities, Indigenous Peoples, women and gender minorities (transgender, gender-fluid, nonbinary and Two-Spirit people), and racialized minorities.**

II.   The Recruitment Process

A.   Advertisements

1) All CRC recruitment and nomination processes at universities must be transparent, open, and equitable. This applies to the nomination of new chairs, whether the chair is used for retention purposes or as a recruiting tool. It also applies to the advancement of a Tier 2 chairholder to a Tier 1 chair.

2) Place the advertisement in accordance with UBC Policy HR11: Employment Advertising Policy. Please refer to the advertising guidelines on the Office of the Provost and VP Academic, UBC Vancouver's site. Advertisements must be publicly posted for a minimum of 30 days (even those only open to internal applicants). In keeping with transparency, CRC postings may be advertised no more than two years prior to the nomination being put forward to TIPS.

3) Create a CRC advertisement that encourages applications from excellent candidates belonging to the designated equity groups. Ensure that the advertisement is clear that nominations will be restricted to chairholders from traditionally under-represented groups, and in particular, include the language from the 2019 Addendum to the 2006 Canadian Human Rights Settlement Agreement:

> "In accordance with UBC's CRC Equity, Diversity, & Inclusion Action Plan [https://academic.ubc.ca/sites/vpa.ubc.ca/files/documents/EDIAP - 13 DEC 2018 EE.pdf], and pursuant to Section 42 of the BC Human Rights code, the selection will be restricted to members of the following designated groups: persons with disabilities, Indigenous Peoples, women and gender minorities (transgender, gender-fluid, nonbinary and Two-Spirit people), and racialized minorities. Applicants to CRC positions are asked to complete this equity survey [https://ubc.ca1.qualtrics.com/jfe/form/SV_6WJHol7SfPxRMu9] as part of the application, and candidates from these groups must self-identify as belonging to one or more of the designated equity groups to be considered for the position. Because the search is limited to those self-identifying as members of designated equity groups, candidates must also provide their name to be considered.

Personal information is collected under the authority of sections 26(a) and 26(c) of the BC *Freedom of Information and Protection of Privacy Act.* The information you provide will only be used to determine whether you qualify for participation in this hiring process. Data will be collected by the Equity & Inclusion Office and only the names of those who identify as persons with disabilities, Indigenous Peoples, women and gender minorities (transgender, gender-fluid, nonbinary and Two-Spirit people), and racialized minorities will be shared with the search committee. Currently, UBC has a gap in representation for people with disabilities. Until such time as this is remedied, the names of those self-identifying as having a disability will be provided separately to the search committee. Responses will be stored in a secure database."

Please note: as advertisements are posted through different recruitment software, hyperlinks may not work: it is imperative that you provide the link in full beside its description in the posting. (e.g. equity survey [https://ubc.ca1.qualtrics.com/jfe/form/SV_6WJHol7SfPxRMu9]). If the advertisement is posted through Workday, candidates will only be eligible if they fill out the CRC equity survey from the link (above) in the advertisement. The Workday recruitment process will also ask them to fill out UBC's demographic survey. That survey provides aggregate applicant pool data for UBC across staff and faculty.
In addition, this equity survey reproduces the CRCP survey from Ottawa to provide comparable data, however, it uses different language that does not necessarily represent the way that these questions are asked in equity surveys conducted by UBC. If you have questions, please contact the Equity & Inclusion Office.

For more information about Restricted Hiring, please refer to the FAQs on our CRC website.

4) Advertisements for Tier 2 Chairs should also contain the following information:

"Tier 2 Chairs are intended for exceptional emerging scholars (i.e., candidates must have been an active researcher in their field for fewer than 10 years at the time of nomination). Applicants who are more than 10 years from having earned their highest degree (and where career breaks exist, such as maternity, parental or extended sick leave, clinical training, etc.) may have their eligibility for a Tier 2 Chair assessed through the program's Tier 2 justification process."

Further information on this process can be found here – Tier 2 Justification Process.

"UBC recognizes the legitimate impact that leaves (e.g. maternity, leave due to illness) can have on a candidate's record of achievement. These leaves will be taken into careful consideration during the assessment process."

For contact information regarding UBC's accommodation and access policies and resources, please visit the Centre for Accessibility: https://facultystaff.students.ubc.ca/student-engagement/centre-accessibility/faculty-and-staff-disabilities

5) As per UBC Policy HR11, all advertisements must include the following equity statement:

"Equity and diversity are essential to academic excellence. An open and diverse community fosters the inclusion of voices that have been underrepresented or discouraged. We

encourage applications from members of groups that have been marginalized on any grounds enumerated under the B.C. Human Rights Code, including sex, sexual orientation, gender identity or expression, racialization, disability, political belief, religion, marital or family status, age, and/or status as a First Nation, Metis, Inuit, or Indigenous person."

6) Accommodations during interview process: UBC has committed to supporting workplace accommodations for CRCs through a pilot for centralized accommodations funding. This includes accommodation expenses (if any) during the interviewing process. Ensure that all advertisements include the following:

"UBC welcomes and encourages applications from people with disabilities. Accommodations are available on request for all candidates taking part in the selection process. To confidentially request accommodations, please contact ** at **(phone) or **(email)."

[**Please complete with the name and contact details of the administrator supporting the interviewing process**.]

To support the administrator's ability to provide necessary accommodations appropriately, information and support is available through these accommodations specialists on each campus: Susan Lebrun at UBCV (sue.lebrun@ubc.ca) and Carleigh Benoit at UBCO (carleigh.benoit@ubc.ca). Additional information is available in the FAQ section on the CRC website, as well as the training/ resource information available through the HR Advisor (UBCV & UBCO) or the Equity & Inclusion Office (UBCV & UBCO).

7) Many units are requesting diversity statements (similar to a teaching or research statement) from applicants. Consider including a statement similar to the following:

In *UBC's Strategic Plan: Shaping UBC's Next Century,* inclusion, innovation, and collaboration have been identified as our key themes. We welcome colleagues with the experiences and skills to contribute to our principles of inclusion, equity, and diversity throughout campus life. Please tell us about your strengths and experiences in increasing equity, diversity, and inclusion in your previous institutional environment, in curriculum, and in supporting diverse students."

8) To attract and secure the best possible candidates, use the objective, measurable criteria established earlier when listing qualifications in your advertisements, with the relative weighting of importance determining the ordering of criteria.

9) If you would like a review of the language in your posting to support its success in attracting excellent candidates from diverse backgrounds, please contact the Equity & Inclusion Office (info@equity.ubc.ca) prior to posting.

10) Final drafts of all advertisements must be submitted to ubcvpao-g-ubccrc@mail.ubc.ca before they are passed to Faculty Relations through Workday. Final approval will be provided by the Provost's Office.

11) A copy of the chair posting/advertisement must be included with all nominations submitted to the CRC program for peer review. Nominations that do not provide evidence of an openly

advertised process (please see [Diversifying Your Applicant Pool](#)), with transparent and open language about the restricted nomination program, will not be accepted by the program – this applies to all recruitment, retention, advancement, and international nominations.

12) Publicly advertise all Chair positions on UBC's public accountability web page for a minimum of 30 days prior to the closing of the competition (this applies to all new nominations, even those open only to existing or internal faculty members).

13) Clearly indicate the date initially posted in the job posting, and be aware that in keeping with transparency, a job posting may be advertised no more than two years prior to the nomination being put forward to TIP.

14) On the day the chair position is posted online, please send a dated copy of the advertisement and links of all job postings to ubcvpao-g-ubccrc@mail.ubc.ca, who will ensure it is forwarded to CRCP.

B.   Special efforts to attract the attention of qualified candidates among the federally designated equity groups

1) Consider networks that researchers in the Faculty (and beyond) may have to reach potential candidates from underrepresented groups, and develop a strategy to strengthen or develop those networks.

2) Review and develop networks among academics and research areas of focus that include members of the federally designated equity groups for this and future searches at UBC.

3) Post advertisements in specialized journals, newspapers, list serves etc., directed to persons with disabilities, Indigenous peoples, racialized people or women and gender diverse people. Please refer to the "[Diversifying Your Applicant Pool](#)" database, including Tips & Tricks, to ensure that you have accessed and updated information to support searches that particularly focus on ensuring diversity in your applicant pool.

4) Write letters and other communications targeted to members of these groups.

5) Encourage personal networking targeted to members of these groups.

6) Facilitate measures to ensure the candidate pool is sufficiently large.

III.   The Selection Process

C.   The Search Committee

1) Establish your search committee with consideration for the diversity of the committee members. Consider asking underrepresented faculty, particularly those currently under-represented among CRCs, to participate in the search committee. Be mindful of workload and

any imbalance in other requests for faculty who identify as members of underrepresented groups to participate in committees, etc., in comparison with their colleagues.

2) TIPS and the CRC EDI Action Plan require that all search committee members receive training on equity and diversity in the search process. Please contact your Associate Dean with responsibility for equity or the Equity & Inclusion Office (info@equity.ubc.ca) to arrange a workshop. Equity in Hiring, an online video series on the workplace learning platform, is an asynchronous way to ensure that training is completed by all search committee members as well.

3) With the search committee: establish the objective, measurable criteria for the CRC position, and weight each criterion's relative importance. Consider criteria that include the assessment of a candidate's equity, diversity, and inclusion skills and their ability to work with diverse colleagues. The CRCP provides this guidance, "Require, as part of the job criteria, a track record related to EDI. Encourage applicants to identify their strengths and experiences in increasing EDI in their previous institutional environment, and in curriculum, and in supporting diverse students."

4) Ensure that the selection committee chair and members understand their roles in the selection process and their roles as representatives of UBC.

5) Confirm that all selection committee members understand how applicant pool data are collected and used, and their purpose in supporting equitable hiring.

6) Confirm that all selection committee members have received equitable recruitment training within the last two years.

7) In order to comply with provincial Freedom of Information and Protection of Privacy (FIPPA) and Human Rights legislation, all members of the selection committee should ensure an objective and transparent process.

D.   Documentation During the Recruitment and Selection Process

1) Keep a factual record of the recruitment and selection process. Include copies of advertisements as well as descriptions of special measures to recruit members of the designated groups. Should human rights groups or government agencies inquire about your recruitment and selection procedures, you may be required to produce evidence that your hiring process was fair. Also, candidates may request access to records relating to them under the Freedom of Information process. Records must be kept for a period of one year from the time of the interview and should be filed in a secure place. In addition, if the successful candidate is an international academic, records must be kept for six years from date of hire.

2) The Equity & Inclusion Office will track the success of your proactive recruitment strategies through the applicant employment equity survey data and upon request to ubcvpao-g-

ubccrc@mail.ubc.ca provide a confidential report to the search committee as soon as they are notified that the search process is closed.

E.   Reviewing Applications and Shortlisting

1) **Prior to reviewing any applications,** please contact the CRC Secretariat at ubcvpao-g-ubccrc@mail.ubc.ca to receive details of your applicant pool data.

> You will be provided with a breakdown of the proportion of applicants who have self-identified as members of each of the designated equity groups and the names of those candidates eligible to be considered.

> Because of UBC's current equity targets, the names of all candidates self-identifying with a disability will be shared with the selection committee [only] to ensure that they are immediately placed on the longlist.

> Those applications from people who have not self-identified as a member of at least one of the designated equity groups are not eligible for nomination.

> In cases where a particular position is restricted to one designated equity group because of the equity targets, your candidate pool will only include those people.

2) When submitting the appointment file to the Provost's Office, please provide an explanation as to why each of the candidates who have indicated they have a disability were not shortlisted.

3) Review and evaluate every applicant against the previously established, weighted criteria that are job-relevant, objective, and measurable. Best practices dictate that every selection committee member review every application.

4) Establish your longlist of candidates based on those who meet the minimum advertised qualifications. From this pool, derive your shortlist for interview. Departments must be able to document and justify the way in which they developed their shortlists. It is suggested that selection committee members frame the shortlist as those whom they agree should be invited to an interview, rather than those who should not be included.

5) As with all shortlisting processes, review the applications to ensure the list does not reflect bias. One example of bias that may show up in shortlisting is stereotypical assumptions about the importance of an uninterrupted work record. These assumptions often disadvantage women, persons with disabilities, or recent immigrants. Ask yourself: is an uninterrupted work record a valid test of a candidate's ability to meet the requirements of a position? Other assumptions that may lead to bias may need to be discussed and reviewed among the selection committee.

F.   The Interview

1) Prior to the interview, develop a set of questions based on stated criteria and ask all candidates, including internal ones, the same questions. Ensure that questions assess criteria that can be evaluated objectively.

2) Ensure that the offer to provide any necessary accommodations for the interview process is included in any email communications to set up the interviews [see above and FAQs on our website]:

> "UBC endeavours to create the conditions for a successful interview process. If you require any type of accommodation during this process, please contact [Susan Lebrun at sue.lebrun@ubc.ca in Workplace Health Services (UBCV)] or [Carleigh Benoit at carleigh.benoit@ubc.ca in the Work Reintegration & Accommodation Program (UBCO)] as soon as possible."

> [**To be completed by the department setting up the interviews**.]

3) Discuss each candidate in turn as interviews take place. Set aside time after each interview for a discussion.

4) When selecting the preferred candidate, focus the discussion on the weighted criteria for the CRC. Encourage selection committee members to ground this discussion in examples from the interview or from the application.

IV. Finalizing the Appointment

1) Before finalizing the appointment, ensure that the successful candidate is provided with information or links to information about the range of institutional supports for comparable chairs based on the annual comparative review, in accordance with UBC's CRC Equity, Diversity, and Inclusion Action Plan and the CRCP requirements.

2) Please ensure that the following paragraph (with the appropriate campus contact) is included in the offer letter:

> "UBC endeavours to create the conditions for a successful career for all its employees. UBC supports UBC Canada Research Chairs and managers involved in workplace accommodations for employees with disabilities. Should you require disability-related accommodations, please contact [Susan Lebrun at sue.lebrun@ubc.ca in Workplace Health Services (UBCV)] or [Carleigh Benoit at carleigh.benoit@ubc.ca in the Work Reintegration & Accommodation Program (UBCO)] as soon as possible."

3) If appropriate, speak to the Vice-President, Academic regarding the possibility of facilitating priority placements for chairholders with disabilities for housing and childcare programs at UBC.

4) The CRCP Nomination Attestation Form should be requested from ubcvpao-g-ubccrc@mail.ubc.ca. Once completed, it is returned to the same. This form must be completed to have the nomination advanced.

5) UBC Human Resources provides detailed Appointments Checklists for New Tenure/Tenure Track Appointments. All forms and materials should be completed and submitted to Faculty Relations.

6) Upon acceptance of the position by the successful candidate, notify the UBC CRC Secretariat via email at ubcvpao-g-ubccrc@mail.ubc.ca.