Step-by-Step CRC Appointment Guide

This guide[1] 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. Additional support to equitably select CRCs can be found in the Guide to Equitable Hiring Practices: Faculty Recruitment.

Please review this CRC Appointment Guide in its entirety before beginning your search process because the CRC Program (CRCP) nominations process continues to be updated. 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 (listed below in section I.3) 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 ubc.crc@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**, 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 Canada Census and 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 targets to address the underrepresentation of chairholders from one or more of the **Federally Designated Groups (FDGs): Indigenous Peoples, racialized people, people with disabilities, and women and gender equity-seeking groups.** (See: June 2021 representation in the CRCP and the 2029 targets). Consider the intersectionality of identities in discussing CRC positions – in other words, consider how people at the intersection of multiple identities may be experiencing both compounding and unique barriers to equity, showing up as an exacerbated gap in representation (e.g., racialized women).

4) **Please note**: in accordance with the latest CRCP directive, institutions found not to have met their targets or target deadlines leading up to 2029 are limited to submitting new nominations only from individuals self-identifying as belonging to one or more of the FDGs, until their gaps for that deadline are met. All renewals can continue to be submitted during this time.

5) Institutions that do not meet their equity targets by the December 2029 deadline will see their total allocation of Chairs reduced until the following allocation cycle. Institutions will lose one Chair allocation for every equity target (or gap) not met by the December 2029 deadline. For example, if an institution does not meet an equity target by two Chairs, it will lose a total of two Chair allocations. Similarly, should an institution have a gap of two Chairs for one of the four designated groups and a gap of one for another, the institution will lose three allocations. **It is essential that the language provided in this guide (See: Section II. A – Advertisements) 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 or more of the federally designated equity groups (FDGs): Indigenous Peoples, racialized people, people with disabilities, and women and gender equity-seeking groups.**

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's Employment Advertising Policy HR 11. Please refer to the advertising guidelines on the VP Research & Innovation website, here. 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 FDGs. Ensure that the advertisement is clear that nominations will be restricted to those self-identifying as members of FDGs, and in particular, include the language from the 2019 Addendum to the 2006 Canadian Human Rights Settlement Agreement:

"In accordance with the 2019 Addendum to the 2006 Canadian Human Rights Settlement Agreement, UBC's CRC Equity, Diversity, & Inclusion Action Plan [https://research.ubc.ca/federal-research-chair-programs/canada-research-chairs/ubcs-commitment-equity-diversity-and], and pursuant to Section 42 of the BC Human Rights code, the selection will be restricted to members of the following federally designated groups: Indigenous Peoples, racialized people, people with disabilities, and women and gender equity-seeking groups. 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 federally designated groups to be considered for the position. Candidates must also provide their name in the survey to be considered.

Personal information is collected under the authority of sections 26(a), 26(c) and 26(e) of the BC Freedom of Information and Protection of Privacy Act. The information you provide will be used to determine whether you qualify for participation in this restricted process, and to advance accessibility, equity, and fair adjudication in this process. Data will be collected by the Equity & Inclusion Office and only the names of those eligible for the search process will be shared confidentially with the search committee. All 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, the Workday recruitment process will ask applicants to fill out UBC's demographic survey, which provides aggregate applicant pool data for positions across UBC.** Note: **candidates will only be eligible for CRC recruitment if they fill out the CRC equity survey from the link (above) in the advertisement.**

In addition, the CRC equity survey reproduces the CRCP self-identification survey from Ottawa to provide comparable data and uses language distinct from how these questions are asked in other employment 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 under the "Diversity considerations in hiring" tab.

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 (including where career breaks exist, such as maternity 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 COVID-related research interruptions and eligible leaves (e.g., maternity, parental, medical, bereavement) 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 Workplace Accessibility.

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) Accessibility and accommodations during the interview process: UBC is committed to supporting workplace accommodations. This includes accommodation expenses (if any) during the interviewing process. Ensure that all advertisements include the following:

   "The University is committed to creating and maintaining an accessible work environment for all members of its workforce. Within this hiring process we will make efforts to create an accessible process for all candidates (including but not limited to disabled people). Confidential accommodations are available on request by contacting [Name, Faculty/Department by email at (relevant email)].

   If you have any questions regarding accommodations or accessibility during the recruitment and hiring process or for more information and support, please visit UBC's Center for Workplace Accessibility website at https://hr.ubc.ca/health-and-wellbeing/working-injury-illness-or-disability/centre-workplace-accessibility or contact the Centre at workplace.accessibility@ubc.ca."

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

   To enhance the administrator's ability to provide necessary accommodations appropriately, information and support is available through the Centre for Workplace Accessibility at workplace.accessibility@ubc.ca. Additional information is available in the FAQ section under "Diversity considerations in hiring" 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) Request that applicants submit a brief statement (1-2 pages) of their current or planned contribution to advancing equity, diversity, and inclusion in academic, professional, or community contexts - similar to a teaching or research statement. Include the following language in the application requirement section:

   UBC is committed to advancing inclusive excellence in the academic and research ecosystem. Please provide a brief statement (1-2 pages) that describes any current or planned engagements and contributions made to advancing equity, diversity, and inclusion in academic (research/scholarship, teaching/learning), professional (non-academic or clinical work), or community (local, national, international community-based) contexts.

8) To attract and secure excellent candidates, develop and use CRC evaluation criteria (under the "Diversity considerations in hiring" on this webpage) that are aligned with the bona fide requirements of the job and qualifications associated with your advertisement.

9) If you would like a review of the language in your posting to ensure the content aligns with accessibility and equity commitments and obligations, please contact the Equity & Inclusion Office (avp.eio@equity.ubc.ca).

10) Final drafts of all advertisements must be submitted to ubc.crc@ubc.ca before they are passed to Faculty Relations through Workday. Final approval will be provided by the VPRI Office, in consultation with the Equity & Inclusion 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 the Tri-agency Institutional Programs Secretariat (TIPS).

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 ubc.crc@ubc.ca, who will ensure it is forwarded to CRCP.

B.   Special efforts to attract the attention of qualified candidates among the federally designated groups (FDGs)

1) Consider networks that researchers in the Faculty (and beyond) may have to reach potential candidates from FDGs 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 FDGs for current and future searches at UBC.

3) Post advertisements in specialized journals, newspapers, list serves, etc., directed to people with disabilities, Indigenous Peoples, racialized people and/or women and people from gender equity-seeking groups. Please refer to the "Diversifying Your Applicant Pool" database, including "Tips & Tricks", to ensure that you have 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, with particular attention to inviting faculty from FDGs that are currently under-represented among CRCs, where that information is known. Be mindful of workload and any imbalance in other requests for faculty who identify as members of FDGs to participate in committees, etc. Among the membership, appoint an Employment Equity Advisor (EEA) who will be empowered to (1) engage the search committee in ongoing consideration of personally-mediated biases and systemic barriers, and (2) liaise with the Equity & Inclusion Office (EIO) regarding the application of equitable hiring practices in accordance with this Appointments Guide and the Guide to Equitable Hiring Practices. The EEA will be expected to engage with training materials and supports provided by the EIO.

2) TIPS and the CRC EDI Action Plan require that all search committee members receive training on equity in the search process. Please contact your Associate Dean with responsibility for equity or refer to the Equity & Inclusion Office's Employment Equity Advisor Program to arrange required training. Equity in Hiring, an online video series on the workplace learning platform, is an asynchronous way to ensure all search committee members are familiar with some key concepts.

3) With the search committee, establish the evaluation criteria for the CRC position, based on the bona fide requirements of the job and listed CRC qualifications by tier (under the "Guidance to Meet CRC EDI Nominations Requirements" on this webpage). Integrate equity, diversity, and inclusion considerations across the criteria, as well as a criterion specifically to assess a candidate's capacity to contribute to and advance equity, diversity, and inclusion. 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." The Equity & Inclusion Office can work with Faculty Equity Leads or Advisors to support the development of evaluation rubrics that holistically consider equity, diversity, and inclusion.

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. The Equity and Inclusion Office will work with the Faculty or Employment Equity Advisor to ensure that self-ID data is appropriately reported and stewarded through the recruitment and hiring process.

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 transparent advertising practices and confidential recruitment and selection processes. Share

the Office of University Counsel's [Fact Sheet](#) and [Non-Disclosure Agreement](#) with the members of the selection committee.

D.   Documentation During the Recruitment and Selection Process

1) Keep a record of the recruitment and selection process. Include copies of advertisements as well as descriptions of special measures taken to recruit members of FDGs. 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 the date of hire.

2) To assess the success of hiring strategies, the CRC Secretariat will request the Equity & Inclusion Office (EIO) to provide a confidential summary report of the diversity profile of the applicant/candidate pool from the applicant equity survey data at various points in the recruitment and selection process (applicants, longlists/shortlisted candidates, finalists, and hires). Please notify the CRC Secretariat at ubc.crc@ubc.ca as soon as the search process is closed, so they can request the report from the EIO.

E.   Reviewing Applications and Shortlisting

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

   You will be provided with the names of those candidates eligible to be considered and a breakdown of the proportion of applicants who have self-identified as members of each of the FDGs (provided the applicant pool is large enough to maintain confidentiality). Applications from people who have not self-identified as a member of at least one FDG are not eligible for nomination. If a particular position is restricted to one FDG because of the equity targets, your candidate pool will only include those eligible.

   The aggregate data for the demographic profile of the pool of eligible candidates, if numbers are large enough to maintain confidentiality will be shared with the search committee.

2) Each committee member should independently review and evaluate every applicant against the previously established job-related criteria. Members should score and rank applicants to develop their longlist.

3) The Committee Chair should aggregate the rankings in preparation for a committee discussion of the longlisted candidates. The Chair should review the diversity profile of the longlisted candidates, and work with the Faculty or Employment Equity Advisor to take a 'second look' at any competitive candidates among FDGs who were excluded from longlists to ensure assessments were fair and unbiased.

4) The Committee should, as a group, deliberate on the longlisted pool and derive the shortlist for interview. Departments must be able to document and justify how they developed their shortlists. The Chair should review the diversity profile of the shortlist and work with the Faculty or Employment Equity Advisor to take a 'second look' at competitive longlisted FDGs. It is suggested that selection committee members use an expansive and inclusive, rather than exclusive, frame when deciding on the shortlist, inviting those whom they agree are within the zone of excellence and they would like to learn more about through interviews. Inviting greater numbers to interview may enhance the committee's capacity to advance inclusive excellence in the hiring process.

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, people 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 will 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 are related to the established evaluation criteria.

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 is committed to accessibility. If you require any type of accommodation during this process, please contact ** at ** (phone) or ** (email)."

> [**To be completed by the department setting up the interviews**. The administrator named in this offer can contact the Centre for Workplace Accessibility for support and information at workplace.accessibility@ubc.ca, and also see the FAQs on the CRC website.]

3) Review the Guide to Equitable Hiring Practices: Faculty to ensure accessibility and equity for all candidates during the interview, including assigning an Employment Equity Advisor to the search committee.

4) After each interview, search committee members should independently make brief notes and quickly score the candidate to help them recall their impressions for when the entire committee will debrief and deliberate on all candidate interviews. Set aside a few minutes after each interview for this independent notetaking.

5) Monitor the diversity profile of longlists and shortlists to be able to re-examine (take a second look at) applications that are competitive and at/near the (often arbitrarily determined) 'zone of excellence'. The concept of a 'zone of excellence' refers to the range of qualifications and qualities that would support a candidate to successfully fulfill the responsibilities of a role.

This concept is used to encourage "expanded ways to measure excellence", inviting Committee members to consider the totality of a candidate's demonstrated accomplishments and future promise. This approach interrupts very narrow and conventional academic conceptualizations of excellence which have been shown to exclude FDGs. 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 is committed to accessibility. UBC Canada Research Chairs are invited to discuss their workplace accommodations needs with the Department Chair, before or during the onboarding process. Should you require confidential disability-related information or accommodations, please contact the Centre for Workplace Accessibility at workplace.accessibility@ubc.ca for information and support as soon as possible.*"

3) Where there is a question about the possibility of facilitating priority placement for chairholders with disabilities for housing and childcare programs at UBC, please contact the CRC Secretariat at ubc.crc@ubc.ca.

4) The CRCP Mid-point Attestation Form should be requested from ubc.crc@ubc.ca. Once completed, it is returned to the same address. This form must be completed to have the nomination advanced.

5) UBC Faculty Relations 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 ubc.crc@ubc.ca.

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[1] This Guide was developed by the Vice-Provost and Associate Vice-President, Academic and the Associate Vice-President, Equity & Inclusion; with the expertise of the Equity & Inclusion Office, and with thanks to reference materials from the University of Toronto, University of Victoria, McMaster University, and has been revised by the Associate Vice-President, Equity & Inclusion and the Associate Vice-President, Research & Innovation since.