Purpose of Faculty Hiring Guidelines

The overarching goal of the Faculty Hiring Guidelines for the Faculty of Education is to operationalize best practices during the faculty renewal process in support of the Faculty’s strategic goals and priorities. We aim to identify and recruit highly qualified, talented, and diverse faculty members, and to coordinate a faculty hiring process that is compliant with search procedures, university policies, and legal and regulatory requirements. We strive to have a consistent selection process for all positions, and minimize ad hoc procedures and a lack of transparency, both of which can contribute to systemic barriers to equity, diversity, inclusion, advancement, and resource distribution. These guidelines are intended to:

1. Encourage a thoughtful and systematic approach to faculty renewal, searches, and hiring;
2. Support our strategic goals and priorities (e.g., to build research expertise in high priority and strong areas within or across borders);
3. Create consistency, continuity, and community;
4. Build teams to support key activities with differentiated expertise;
5. Channel individuals’ time and energy in ways that best match the nature of their appointments and the expertise they bring to the Faculty;
6. Ensure the goals of equity, diversity, and inclusion are applied in the search process;
7. Streamline hiring practices at all stages of the recruitment process; and
8. Integrate the principles of merit, innovation, and excellence with our hiring practices.

This document is informed by: Final Report from the UBC Faculty of Education Task Force on Race, Indigeneity, and Social Justice Final Report (2021); Final Report from the UBC President’s Task Force on Anti-Racism and Inclusive Excellence (2022); UBC Equity & Inclusion Office’s JEDII Series on Equity and Inclusion in Action (2022), and more. Moreover, it serves as an internal policy to guide the hiring processes primarily for tenure stream faculty and Lecturer positions within the Faculty of Education. It is important to note that University policies and procedures and the relevant collective agreements supersede the procedures outlined in this document.

This is a live document and will be updated from time to time to address issues that emerge while conducting searches. Feedback from Heads and Directors, search committee Chairs, and faculty, staff, or students who support searches or serve on search committees is always welcome – please contact educ.hr@ubc.ca.

Step 1: Seeking Approval for a New Faculty Hire

1. Every year, the Dean’s Office sends out a call for tenure stream faculty and Lecturer hiring proposals to be submitted by the Head/Director for the next few (usually three) academic years.
2. The Head/Director shall analyze the unit’s immediate and longer-term faculty renewal and program development needs, enrolment, and budget data, and the Faculty of Education’s and the unit’s strategic plans. Particular attention should be given to the representation of groups designated in UBC Policy HR10 – Employment Equity Policy – women, Indigenous people, racialized people, and persons with disabilities. The Head/Director shall ensure that faculty members who belong to the above equity-deserving groups in the unit are included in the consultation process.
3. The Head/Director shall complete and sign one Faculty Hire Request Form (available on the Faculty of Education website) for each position requested to the Dean for review (by the deadline communicated by the Dean’s Office, if applicable). The Head/Director is asked to answer the following questions in the form:
   a. What is rationale for the proposed stream and rank (i.e. Professoriate/Educational Leadership or Lecturer)?
   b. How will the proposed hire be designed so as to (a) contribute to the diversification and decolonization of the Faculty of Education community in relation to equity, diversity, and inclusion goals, and (b) the diversification and decolonization of the field or discipline that is the substantive focus of the hire?
   c. How will the hire permit the unit to pursue (i – Professoriate Stream only) new research priorities and new program funding opportunities, OR (ii – Educational Leadership Stream only) new curricular and programmatic priorities and new pedagogical innovation opportunities?
   d. How will the hire contribute to achieving the unit’s, Faculty’s, and University’s strategic priorities? This can include: expanding or transforming the area, advancing the Faculty and University’s standing, building on existing strengths, catalyzing new inter-unit or campus-wide initiatives.
   e. How would the new hire strengthen an already-existing interdisciplinary cluster within the Faculty of Education, or more broadly, across the University and beyond?
   f. What is the current level of faculty operations in this area and how do current workload and student demand/changes in the discipline and profession support the request for the hire?
      i. Total number of BEd course sections taught by faculty in this area annually
      ii. Total number of tenure stream faculty in this area
      iii. Total number of graduate course sections taught by faculty in this area annually
      iv. Total number of graduate students in this area & ratio of graduate students to faculty
      v. Evidence of demand for program at point of application to program
   g. What is the revenue source and/or funding arrangement for this hire?
   h. How does the hire link to known or projected retirements, resignations, or other changes in the faculty complement?
   i. What is the proposed workload for the hire, including specific courses likely to be assigned and other responsibilities?
   j. Are there any other considerations including emerging evidence from the field/discipline that strengthen the rationale for the position?

4. The Associate Dean, Faculty Affairs, and Director, HR, in consultation with Associate Dean, Equity & Strategic Programs, will review the Faculty Hire Request Forms and make recommendations to the Dean who may consult Heads and Directors before making final decisions. The Dean will notify the Head/Director in writing of whether the requested position(s) is approved, and if yes, the desired start date(s) and related search timeline(s), and how the position(s) will be funded; or, the Dean will request more information if required.

**Step 2: Initiating a Search and Developing the Job Advertisement**

1. The unit shall develop a draft job advertisement following Policy HR11 – Employment Advertising Policy. The Head/Director may contact the Director, HR, for a template.
2. A job advertisement (position description) typically includes:
   a. A clear statement of the rank and type of appointment.
   b. The nature or focus area of the position (e.g. Economics of Higher Education, Indigenous Curriculum and Pedagogies, Inclusive Education in Teacher Education, etc.).
   c. The desired start date of the appointment.
   d. A general description of UBC and the Faculty of Education (text provided by the Dean’s Office), and the Department/School where the appointment will be located.
   e. Objective, measurable criteria — such as education, experience/ability, and focus of research/educational leadership interests — that will help determine a candidate’s suitability for the position. Criteria, such as the ability to work with diverse students and colleagues, or experience with a variety of teaching methods and curricular perspectives should be considered, if applicable. If the unit knows it will not consider candidates for a position unless they have a certain number of years of experience, for example, that requirement should be clear in the advertisement.
   f. Duties expected of the position.
   g. Statement regarding the Faculty’s goals related to equity, diversity, inclusion, and decolonization, and a preference for candidates with similar commitments (text provided by the Dean’s Office).
   h. Materials that need to be included in a complete application package, typically including the following: cover letter, CV, evidence of teaching effectiveness/excellence, Diversity Statement, sample publications (required for Professoriate stream positions, optional for Educational Leadership stream positions, not required for Lecturer positions), and contact information for at least three references.
   i. Request the applicant to indicate if they are a Canadian citizen or permanent resident (PR).
   j. Requirement to complete an Employment Equity Survey (text provided by the Dean’s Office).
   k. An application deadline; the following language is recommended: “While the search remains open until the position is filled, interested applicants are asked to submit their complete application package by xxx (date). Questions regarding this search and the application deadline should be directed to xxx (email for the search committee Chair or the Head/Director).”
   l. Contact information for the receiver of applicants, and (if different) contact information for applicants with questions about the position. Note: Questions from applicants should be answered via email only (i.e. no meetings, in-person or virtual, with applicants), so as to not advantage or disadvantage certain applicants.
   m. The job advertisement must include the University Employment Equity statement and the Immigration statement, as per UBC Policy HR11 - Employment Advertising Policy: *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. All qualified candidates are encouraged to apply; however, Canadians and permanent residents will be given priority.*
   n. For positions that target an equity-deserving group or groups (e.g. Indigenous, racialized, and/or disabled persons), additional language should be included to encourage candidates to see themselves represented in the job advertisement. Please refer to Appendix A: Considerations for Black, Indigenous, and People of Colour (BIPOC) targeted hires.
3. Before the draft job advertisement is submitted to the Dean’s Office for approval, the Head/Director shall consult widely within the unit and the program area. During these consultations, it is recommended that the Head/Director emphasize the importance of well-thought-out job advertisements to the success of the search process.

4. The Head/Director shall submit the draft job advertisement to the Director, HR, for review and approval by the Associate Dean, Faculty Affairs.

5. The Associate Dean, Faculty Affairs, will review the draft job advertisement for each position, consult the Associate Dean, Equity & Strategic Programs (as needed), and provide approval or request further information.

6. After the Associate Dean, Faculty Affairs, approves the draft job advertisement in writing, the Dean’s Office will submit the final job advertisement in Workday for approval by Faculty Relations and then by the Office of the Provost, for final approval or amendments. The unit will be notified by the Dean’s Office when final approval has been received from the Office of the Provost and the job advertisement is ready to be posted.

7. Units are encouraged to stagger the timelines (e.g. job advertisement start and end dates) of searches that may be happening simultaneously to ensure a well-supported process at the levels of both the unit – for tracking the applicant pool, and holding interviews – and the Dean’s Office, for providing search committee orientations, reviewing recommendations, and preparing and negotiating offers.

Step 3: Distributing the Job Advertisement

1. A final approved version of the job advertisement in the faculty job posting template will be provided to the unit by the Dean’s Office, for external circulation. Draft versions must not be circulated externally.

2. All job advertisements must be advertised for at least one month, with longer time frames encouraged for larger, and likely more diverse, applicant pools. It is important to advertise as widely as possible.

3. All job advertisements must be placed on the unit and Faculty of Education websites. Circulation of job advertisements to professional networks in the field(s) is encouraged.
   - For tenure stream positions, the Dean’s Office will arrange to have the job advertisement placed in a minimum of three national and/or international venues in consultation with the unit, in addition to posting on Canada’s National Job Bank. The typical paid external venues are University Affairs (UA), Canadian Association of University Teachers (CAUT), and the Chronicle for Higher Education (CHE).
   - For tenure stream positions, the Dean’s Office normally covers the cost of job advertisements for a minimum of 60 days in up to three external outlets. If the unit decides to post the advertisement in more than three paid outlets or to run the advertisement for more than 60 days, the additional costs will be the unit’s responsibility, unless otherwise approved by the Dean’s Office.
   - For Lecturer positions, the unit shall arrange to have the job advertisement posted to the sessional ListServ for a minimum of one month. If the unit decides to post the advertisement in any paid external outlets, the costs will be the unit’s responsibility.

4. To reach the widest audience of qualified candidates, the Head/Director and the hiring unit should use not only the typical venues, but also venues of interest to the designated employment equity-deserving groups and candidates whose scholarly interests are likely to diversify and decolonize a given field. This includes – but is not limited to – women and non-binary people, LGBTQ2S+ people, Indigenous people, racialized people, and/or persons with disabilities.
a. UBC Equity Leads developed a resource for additional posting venues in 2020: Diversifying Your Applicant Pool: Places to Advertise.

b. In consultation with faculty members and students with disciplinary knowledge, the unit is encouraged to consider circulating the job advertisement to mailing lists, networks, specialized journals, professional associations, websites, conferences, job fairs, community hubs, and/or workshops in the field.

5. Units shall keep records of where, when, and for how long the job advertisement was posted or circulated, especially when the postings are not arranged by the Dean’s Office.

6. In addition to formal venues, informal ways to encourage qualified candidates to apply are encouraged, such as contacting colleagues at other universities to disseminate the job advertisements through their networks and encouraging applications from promising students and colleagues to apply. Units should consider sending personal emails to potential candidates. Heads/Directors can encourage and motivate colleagues to actively carry out shoulder-tapping so as to recruit eligible scholars who are likely to diversify and decolonize the given field, and to reach members of equity-deserving groups.

Step 4A: Formation of the Search Committee

1. The search committee is responsible to the Head/Director, with the search committee Chair appointed by the Head/Director. The Head/Director, in consultation with the appropriate faculty in the unit and the academic area(s), forms a full search committee following the guidelines below.

2. Because of the distinct roles of the search committee Chair and the Head/Director in the oversight of a search process (as specified throughout this document) and to avoid potential conflicts of interest, a Head/Director shall not serve as search committee Chair of their own unit unless explicitly approved by the Dean, with a strong rationale. In this case, an Acting Head/Director must be appointed by the Dean to serve the Head/Director function for the purpose of overseeing this particular search until its completion. The Acting Head/Director appointment does not impact the Head/Director’s role and responsibility for the unit affairs outside of the search in question.

3. Search committees shall be comprised as such:
   a. For Tenure Stream Hires, the search committee typically consists of:
      i. One Chair who is a tenure stream faculty, typically at the Associate Professor or Professor level; searches at the Professor level should be chaired by a Professor. Unless explicitly approved by the Dean at the Head/Director’s request in exceptional circumstances, there should only be one chair for each search (i.e. co-Chairing is not encouraged);
      ii. Three or four additional tenure stream faculty members from the hiring unit;
      iii. One or two student representatives;
      iv. One external member, who is a tenure stream faculty;
      v. Educational Leadership search committees normally will include at least one Educational Leadership faculty member.
   b. For Lecturer Hires, the search committee typically consists of:
      i. One Chair who is a tenure stream faculty, typically at the Associate Professor or Professor level);
      ii. Three or four tenure stream faculty members and/or Lecturers;
      iii. One or two student representatives;
      iv. an external member is not required.
c. Additional notes for considering search committee composition:
   i. The committee should be as diverse as possible including people associated with the area of scholarship who have broad perspectives, those from designated equity-deserving groups, and others who have experience from searches who can contribute to good practice. If the unit does not have members from designated equity-deserving groups, an invitation to others from related units should be considered.
   ii. In search committees for positions that target an equity-deserving group or groups (e.g. Indigenous, racialized, disabled persons), additional efforts should be made to ensure appropriate representation and leadership of that group on the search committee.
   iii. The incumbent of the position being filled (the faculty member that has resigned or is retiring) shall not be on the search committee, but can be consulted.
   iv. Faculty Emeriti on search committees require special permission with a specific rationale as to their membership. In most cases, it is not permitted for faculty Emeriti to sit on search committees.
   v. Faculty supervisors of graduate students should generally not be included on the same search committee with their students.

4. The Head/Director should carefully plan the composition of the search committee to include faculty members from equity-deserving groups.
   a. Considerations should also be given to include faculty who are experts in decolonizing methods or fields or who actively engage in equity, diversity, and inclusion work.

5. The Head/Director should provide prospective members with the general timeline of faculty searches to help plan ahead and identify available capacity to serve.

6. The Head/Director shall submit:
   a. The proposed composition of the search committee to the Dean’s Office, including who will serve as Chair; and
   b. A rationale for the composition and diversity of the proposed membership. The rationale should outline how the committee membership includes the expertise and knowledge in the field of study and how its composition enhances the likelihood that equity, diversity, and inclusion (EDI) goals will be realized.
      i. In the rationale, Heads/Directors are encouraged consider how a committee as a group has diverse and inclusive representation, not only in terms of identities but also in embedding EDI knowledge, goals, and values within their teaching, research or educational leadership, and service.
      ii. Note that providing a biography or identifiers for each proposed committee member is not considered a rationale of the committee composition.
   c. Consult Appendix B: Considerations for search committee composition and rationale.

7. The search committee membership must be approved by the Associate Dean, Faculty Affairs, who will consult the Associate Dean, Equity & Strategic Programs, and the Director, HR, as needed.

8. The Head/Director shall announce the membership of the search committee to the unit as soon as it is approved by the Associate Dean, Faculty Affairs. In some cases, the search committee may be involved in framing the job advertisement, but in all cases the committee should be approved no later than the application deadline on the job advertisement.
Step 4B: Receiving Applications and Communicating with Applicants

1. As soon as each application is received, a confirmation email will be sent by the unit (usually by the administrative support staff) to each applicant, on behalf of the search committee Chair. The confirmation email to each applicant will copy Dean’s Office HR team at educ.hr@ubc.ca. See Appendix C for a template. The Dean’s Office will then follow up with each applicant for the mandatory Employment Equity Survey (see more under Step 7A: Understanding the Diversity of the Applicant Pool).
2. All applications must be received by the application deadline identified in job advertisement.
3. Once received, applicant files shall be stored in a secure location by the unit support staff (OneDrive, TeamShare, or Canvas) and not shared with search committee members until Step 7: Reviewing Applications.
4. Communication with applicants must occur at important steps through the process. The hiring unit is responsible for informing the unsuccessful applicants at appropriate times, including when they do not make the longlist (if applicable), the shortlist or the interview list, and/or are not offered the position. Suggested templates of messages that should be communicated at each step are found in the Appendices. Typically, communications are sent by the support staff on behalf of the search committee Chair (or Head/Director, whichever applies to the specific step).
   a. These steps are important opportunities to demonstrate professionalism. Our searches are conducted over a lengthy period of time, and as such, it is necessary to inform applicants from time to time of their status and the progress of the search.
   b. It is the responsibility of the search committee Chair and/or Head/Director to respond to all inquiries from potential applicants with the goal of encouraging a diverse applicant pool. Note: It is strongly encouraged that questions from applicants be answered via email only (i.e. no meetings, in-person or virtual, with applicants), so as to not advantage or disadvantage certain applicants.

Step 5: Search Committee Meetings and Criteria Confirmation

A. Search Committee Meetings (including Orientation)

1. Once the search committee membership is approved by the Dean’s Office, the support staff in the hiring unit will schedule multiple search committee meetings as the process requires, in consultation with the search committee Chair. Typically, this might include:
   a. First Meeting (two hours) for search committee orientation and confirming the search criteria (see bullet 2);
   b. Second Meeting (two hours) to discuss the applications and select a longlist and/or shortlist (this might require multiple meetings, see Step 7: Reviewing Applications);
   c. Third Meeting (one and a half hours) to develop interview questions and confirm candidate visits;
   d. Interviews and Candidate Visits (see Step 8: Interview Activities);
   e. Fourth Meeting (one hour) to deliberate and rank the shortlisted candidates for hiring recommendations.

It is the search committee Chair’s responsibility to determine the modality of search committee meetings (in-person, virtual, or hybrid), as well as to ensure the committee members’ attendance at the scheduled meetings and their participation in the search process.
2. There is no stand-alone orientation meeting. Rather, the first search committee meeting for all tenure stream and Lecturer faculty positions must include one-hour at the beginning for an orientation provided by the Dean’s Office.
   a. It is recommended that the first search committee meeting is scheduled for two hours, to allow time for both the orientation and for the committee to confirm the search criteria (see Step SD: Search Criteria Confirmation).
   b. It is recommended that the first search committee meeting be scheduled within one week of the application deadline to ensure that the process of reviewing applications can happen relatively soon after the search criteria are approved by the Dean’s Office.
3. The search committee orientation will include various policy- and process-related aspects of the search procedures governed by the Collective Agreement and/or BC Labour Law and Human Rights Code and equity, diversity, and inclusion (EDI) in faculty searches. The orientation typically covers:
   a. Confidentiality both in terms of the selection process and decisions made;
   b. Conflict of Interest, UBC Policy SC3 – Conflict of Interest Policy;
   c. Coercion and potential power dynamics on a search committee;
   d. Understanding eligibility to work in Canada and legal requirements involved in a search;
   e. Reviewing key steps in the search process;
   f. Equity, diversity, and inclusion (EDI) in faculty searches, with particular attention to Diversity Statements, Equity Employment Survey, Rubric for Assessing Candidates’ Contributions to EDI, and EDI considerations at key step in the process; and
   g. Answering questions from the search committee.
4. Deliberations in search committee meetings are confidential and that confidentiality should be strictly maintained. Committee members must be able to express their opinions freely within the committee and those who communicate their views to the committee must be able to do so in confidence.
5. Following the search committee orientation, the Associate Dean, Faculty Affairs, shall meet with the search committee Chair and the support staff to review key aspects of the role(s), review a checklist document, and answer any questions about the search process.
6. Following the search committee orientation, the search committee Chair, in consultation with the Head/Director, shall reach out to student member(s) on search committees early in the process to provide additional support in order to encourage student participation.

B. Keeping a Record of the Process

1. The search committee Chair is responsible for maintaining a factual record of the process. Should there be inquiries or concerns about the search or hiring procedures, the search committee Chair may be required to produce records that document the search process.
2. These records should include:
   a. The names of the search committee members, including the Chair;
   b. A list of advertising venues and professional organizations to which the job advertisement was posted or circulated, including (if applicable) descriptions of special measures taken to recruit members of equity-deserving groups;
   c. All applicants’ files (including their cover letters, CVs, letters of reference [when received], Diversity Statements, evidence provided of teaching effectiveness, other application materials, and emails exchanged with the applicants).
3. Records must be kept for a period of one year after the search process is over (i.e. upon receipt of the signed offer letter from the successful candidate or a confirmation from the Head/Director that the search is closed) and be kept in a secure location such as OneDrive, TeamShare, or Canvas.

C. Resources for Understanding Unconscious and Implicit Bias

1. According to UBC Policy HR10 - Employment Equity Policy: “The fundamental principle for recruitment and retention of faculty and staff at the University of British Columbia is individual achievement and merit. Consistent with this principle, the University will: advance the interests of women and Indigenous, disabled, and racialized persons; ensure that fair and equal opportunity is afforded to all who seek employment at the University; and treat equitably all faculty and staff.”

2. There is evidence, however, that unconscious or implicit bias or assumptions influence the evaluation of academic accomplishment. Some external resources include:
   a. The Tri-agency Institutional Programs Secretariat (TIPS) defines equity as “the removal of systemic barriers and biases to enact the practice of fair and equitable treatment so that all individuals have equal access to and can benefit from the programs”. In accordance with TIPS: “The institution must strive to put in place the right conditions for each individual, including those from underrepresented groups—women, racialized minorities, Indigenous Peoples, persons with disabilities and members of LGBTQ2+ communities—to reach their full potential, unimpeded by inequitable practices, including personal and systemic discrimination and racism, imposed by policies, processes and research environments.”
   b. The Canada Research Chairs program recently addressed the issue of unconscious bias and provided recommendations about how to limit its influence in reference letters. They have noted: “Implicit biases operate at an unconscious level, are influenced by our cultural environment and can impact our decision making. A study out of Wayne State University, which systematically compared letters of recommendation written for female applicants with those written for male applicants, found that, compared to the letters written for men, those written for women were more likely to:
      - be shorter in length and incomplete;
      - include gendered terms (e.g., woman, lady, mother, wife);
      - include fewer ‘standout’ adjectives (e.g., excellent, outstanding etc.);
      - include ‘doubt raisers’ (negative language, hedges, unexplained comments, faint praise and irrelevancies);
      - focus on interpersonal attributes vs research skills/achievements (e.g., kindness, compassionate)
      - include personal information that was not relevant to the position.”

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1 Resources on implicit and unconscious bias:
- What is Unconscious Bias? https://leanin.org/education/what-is-unconscious-bias


c. The Office of the Provost also provides resources to guide the search committees in minimizing unconscious or implicit bias through its equity, diversity, and inclusion initiatives.

3. Moreover, search committees are encouraged to shift the conversation from “unconscious bias” to being “bias-conscious” in order to better position active negating of bias as it appears.

**D. Search Criteria Confirmation**

1. Based on the job advertisement, the search committee will need to confirm the search criteria before reviewing applications. An early and thorough discussion of criteria by the search committee will help to avoid “constructed criteria” – criteria chosen to fit specific applicant files. This step will also assist the search committee in thinking carefully about the full range of criteria and their respective weights in consideration. The search committee should consult the Head/Director, as necessary.

2. In advance of the first search committee meeting, the Dean’s Office provides the draft criteria, directly based on the job advertisement. The search committee reviews the job advertisement and confirms a formal documented set of criteria (based on the Draft criteria provided) that will be used at every step including the process of creating a longlist and/or shortlist, interviewing, and making a recommendation.

3. The search committee Chair shall send the draft criteria to the Dean’s Office for approval by the Associate Dean, Faculty Affairs, who will consult with the Associate Dean, Equity & Strategic Programs, and Director, HR, as needed.

4. Upon approval from the Dean’s Office, the search committee Chair shall provide the Head/Director with a copy of the final criteria for the search.

**Step 6: Conflict of Interest and Finalizing the Search Committee Membership**

**A. Perceived and Actual Conflicts of Interest**

1. UBC Policy SC3 – COI Policy states that “conflicts of interest and perceived conflicts of interest that go unnoticed or are improperly managed threaten to impugn the reputation and integrity of the persons involved and, potentially, the University as a whole.” Additionally, “UBC Persons are expected to vigilantly guard against conflicts of commitment, actual and potential conflicts of interest, and perceived conflicts of interest.

2. Although the University has not developed an exhaustive list of conflicts of interest, it offers the following as an example of a situation where a conflict of interest exists: “Where a UBC Person is in a position to influence human resource decisions (such as recruitment, offer of employment, evaluation of performance, promotion, granting of tenure, or termination of employment) … with respect to a person with whom the UBC Person has a relationship that might reasonably be perceived as creating a conflict of interest.”

**B. Conflict of Interest Management Process**

1. A Head/Director who serves as the search committee Chair is considered to be in a conflict of interest with their role as the Head/Director. In this case, an Acting Head/Director must be appointed by the Dean for the purpose of overseeing this search (See Step 4A: Formation of the Search Committee). **Note:** This Acting Head/Director appointment does not impact the Head/Director’s role and responsibilities for the unit affairs outside of this search in question.
2. The search committee Chair and/or the support staff shall review applicant CVs and other application materials to determine:
   a. if any applicant has a close personal/family relationship with any search committee member;
   b. if an applicant’s PhD Supervisor sits on the search committee; and
   c. if any search committee member is listed as a reference for applicant(s) in this particular search.
These types of relationships are considered conflicts of interest that will result in immediate recusal of the search committee member in question from all search committee activities until such a time when the applicant with whom they have such a relationship is not actively being considered.

3. Once the final criteria have been confirmed and established (see Step 5D: Search Criteria Confirmation), search committee members shall review the list of applicants and note any actual or perceived conflicts of interest, and disclose this to the search committee Chair. This may include relationships with applicants as supervisors, trainees, family, or close friends, collaborator in the form of co-publishing or funding sharing (past, present, or future), etc.

4. A course of action shall be undertaken to manage conflicts of interest by the search committee Chair or the Head/Director, in consultation with the Dean’s Office as needed, which may include having a member be recused from the search committee.

5. The search committee Chair will review all conflicts of interest with the Head/Director. The search committee Chair and Head/Director are responsible for ensuring that no declared conflict of interest can influence the outcome of the search and there be no reasonable perception that it might have done so. If necessary, the Dean’s Office can support the search committee Chair and Head/Director to manage any declared conflicts of interest.

6. All recused search committee members may return to the committee at such a time when the applicant with whom they are in a conflict of interest is no longer being actively considered. The Head/Director may need to find a replacement for that individual on the search committee depending on the initial composition of the committee. Please consult the Dean’s Office if a replacement is required.

7. In the case that committee membership changes have been made due to conflicts of interest, a revised search committee membership must be provided to the Dean’s Office for re-approval.

Step 7: Reviewing Applications and Developing of Longlist and Shortlist

A. Understanding the Diversity of the Applicant Pool

1. UBC Policy HR10 – Employment Equity Policy – asks that we “regard individual merit as the prime criterion... for employment” and that we “ensure that fair and equal opportunity is afforded to all who seek employment at the University”.;

2. Search committees cannot screen applicants based on identity, including immigration status or nationality, unless the search is specifically targeting one or some equity-deserving groups in which case only applicants self-identify as members of those equity-deserving groups will be considered.

3. Equity data of the applicant pool are collected by the Dean’s Office through a mandatory Employment Equity Survey:
   a. This survey adheres to Canada’s Employment Equity Act, the Federal Contractors Program, and the Freedom of Information and Protection of Privacy Act (FIPPA). The Employment Equity Survey is anonymous to the hiring unit and the search committee, confidential, and not linked to the application review process.
b. Completion of the survey is required in order for the application to be considered complete.

c. The Dean’s Office will receive the contact information of applicants from the unit (from **Step 4B: Receiving Applications**) and contact the applicants directly with the Employment Equity Survey.

4. The Associate Dean, Faculty Affairs, and Associate Dean, Equity & Strategic Programs, will monitor the results of the Employment Equity Survey and share them with the search committee Chair and Head/Director after the application deadline. The data permit comparison of the proportions of equity-deserving groups in the applicant pool with available workforce data provided by the UBC Equity & Inclusion Office. Tracking the composition of applicant pools will reveal the success of proactive recruitment strategies, determine any need to alter the strategy before applications are reviewed, and inform setting future goals for faculty renewal and recruitment strategies.

5. In addition to the Employment Equity Survey, we can assess the diversity of an applicant pool by any of the approved methods: self-disclosure in CV, Diversity Statement, or other application materials, letters of reference, and direct observation in the interview.
   a. We cannot assess the diversity of an applicant pool, nor a shortlist by any of the following methods: indirect collection of information (e.g. from a 3rd party; hearsay), websites of their current institution or social media, judging from names, asking colleagues of the applicant.

**B. Developing a Longlist (if required)**

1. The search committee shall review and evaluate each application against the final criteria for the search. Additionally, the **Rubric for Assessing Candidates’ Contributions to EDI** can support the committee in reviewing the criteria related to EDI.

2. Following the search committee’s review of all applications, a “longlist” may be developed for applicants who appear to meet the criteria of the position. A longlist is not a required step in the process, and only needs to be used if deemed appropriate (e.g. if the initial applicant pool is very large and there appear to be many qualified applicants).

3. Applicants on the longlist shall be notified that their applications are being actively considered.

4. The search committee Chair and/or the support staff shall notify those who are not on the longlist that their applications are no longer being considered. See **Appendix G** for a template.

**C. Requesting Letters of Reference**

1. Letters of reference are important pieces of information in the search process, and are required before a recommendation for hire is made to the Dean’s Office (see **Step 10: Making the Recommendation for Hire**). It is important to note that requesting letters of reference is an onerous task for those writing, and should be requested in order to inform a decision required in the search process.

2. Typically, letters of reference are requested after the committee has selected a shortlist and both the shortlist and the letters of reference are sent to the Dean’s Office for approval (see **Step 7D: Developing a Shortlist and Seeking Permission to Interview**). However, requesting letters of reference can alternatively take place at any of the following steps:
   a. When the search committee selects a longlist (**Step 7B: Developing a Longlist**), this may be an appropriate time to request letters of reference to narrow down the applicants to a shortlist.
b. After the Dean’s Office has approved the shortlist and is proceeding with planning interviews activities (Step 8: Interview Activities), this may be an appropriate time to request letters of reference in order for the committee to consider the letters alongside the interview activities.

c. After the search committee has selected a top ranked candidate (Step 9) and before a recommendation for hire has been made (Step 10), this may be an appropriate time to request letters of reference in order to support the decision and contribute to making a recommendation for hire (Step 10: Making the Recommendation for Hire). If this approach may be taken, the search committee Chair shall consult the Head/Director and the Director, HR, in advance.

3. A template for informing candidates that letters of reference will be requested can be found in Appendix D and a template for requesting letters from the referees (provided in the application package) can be found in Appendix E.

4. Letters of reference should not be distributed beyond the members of the search committee, in order to ensure confidentiality as the intended readers from the referee.

D. Developing a Shortlist and Seeking Permission to Interview

1. The search committee shall review and evaluate each application against the established and approved final criteria for the search. Additionally, the Rubric for Assessing Candidates’ Contributions to EDI can support the committee in reviewing the criteria related to EDI.

2. Following the search committee’s review of all applications, a “shortlist” must be developed. The shortlist consists of those applicants considered strong enough to be invited for interviews. Normally, the shortlist will include no more than three candidates.
   a. If the search committee is unable to reach a shortlist of three or less, Step 7B: Developing a Longlist may be necessary.

3. The process used by the search committee to arrive at the shortlist should be fully documented by the search committee Chair. The Head/Director should be consulted as needed.

4. The search committee Chair must develop a report on the recommendation of shortlisted candidates, including the following (see Appendix F: Sample report for recommendation for shortlist):
   a. The total number of applications received and the breakdown of international and Canadian applicants;
   b. For each shortlisted candidate, provide a half-page rationale speaking to how their application fits the final criteria and the job advertisement;
   c. A general rationale concerning the diversity of the applicant pool and the shortlist, as well as individual descriptions of the expertise and experience of each shortlisted candidate vis-à-vis equity, diversity, inclusion, and decolonization of the academic area itself;
   d. Shortlisted candidates’ application materials for all candidates on the shortlist, including complete application files and the letters of reference (if received).

5. The search committee Chair shall circulate the draft shortlist report to all search committee members for input and confirmation of accuracy, before submitting it to the Head/Director.

6. If the search committee Chair disagrees with the search committee’s recommendation for the shortlist, the Chair can prepare a separate report to express their own recommendation to the Head/Director. If this happens, the Head/Director shall consult the Dean’s Office about the appropriate procedures to follow.

7. On behalf of the search committee, the search committee Chair provides the shortlist report to the Head/Director for review and approval.
a. If the Head/Director approves the shortlist, proceed to bullet 8 below;
b. If the Head/Director has concerns about the procedures or process through which the shortlist was developed, the Head/Director should ask for more information from the search committee Chair and, if needed, consult the Associate Dean, Faculty Affairs, and Director, HR, who may review the concerns and consult with the Associate Dean, Equity & Strategic Programs.
c. If there are valid problems identified concerning the shortlisting procedures or process (for example, how the final criteria were applied to various candidates), the Associate Dean, Faculty Affairs, will report to the Dean, who will then decide about next steps. This could include a range of outcomes, from clarification of procedures, to revisiting a key process, including repeating the process back to the point of posting the job advertisement or forming a search committee.
d. The Dean’s decision will be communicated to the Head/Director with a rationale. The Head/Director will discuss the Dean’s decision with the search committee Chair or the full search committee, if necessary. The Dean’s decision on the search process is not subject to appeal.

8. The shortlist report approved by the search committee and the Head/Director shall be provided to the Dean’s Office for review and approval by the Associate Dean, Faculty Affairs. This Dean’s Office review and approval must occur before shortlisted candidates are invited to interview activities.

9. The Associate Dean, Faculty Affairs, will review the shortlist report and application materials provided by the search committee and consult the Director, HR, and Associate Dean, Equity & Strategic Programs, as needed. The Dean’s Office will either approve the shortlist or ask for additional information from the search committee Chair or the Head/Director.
   a. The Associate Dean, Faculty Affairs, may ask to see all the applications, and, if serious concerns arise about the shortlist, may decide to pause the search. Such a decision would only occur after a full discussion with the Head/Director and the search committee Chair.
   b. If the shortlist does not include any member of the equity-deserving groups, the Dean’s Office may ask to review the entire application pool to ensure that the list does not reflect any bias. (For example, assumptions about the importance of an uninterrupted work record may disadvantage women, persons with disabilities, or recent immigrants.)

10. Information regarding the shortlisted candidates shall not be disclosed until after each of the applicants has agreed to an interview. Then, information about the shortlisted candidates can be made available to those outside the search committee for the purpose of interview activities (see Step 8: Interview Activities).

11. After all shortlisted candidates have confirmed their agreement to attend interviews (see Step 8: Interview Activities), the search committee Chair and/or support staff will notify those applicants whose applications will not be considered further. See Appendix G for a template.

**Steps 8 and 9: Interview Activities and Identifying the Successful Candidate**

1. After the shortlist is approved, the search committee Chair and/or support staff can invite shortlisted candidates for interview activities and plan the visits accordingly. See Appendix H and Appendix J for templates and further information about logistics of the interview activities.
2. It is strongly recommended that shortlisted candidates visit UBC campus in-person for two days with all meetings conducted face-to-face, if possible. The modality of interviews (virtual, in-person, or otherwise) shall be the same for all shortlisted candidates. If interview activities happen virtually, search committees are encouraged to review the following resource from the UBC Equity & Inclusion Office: [Equity Considerations in Virtual Interviews](#).
3. Typically, the following meetings and activities are included in the interview itinerary for each shortlisted candidate (see Appendix K: Sample schedule for interview activities):
   a. An interview with the search committee (all members) – questions should be developed by the search committee in advance, based on the final criteria, with all candidates being asked the same set of questions (Dean’s Office approval of the interview questions is not required);
   b. Public Presentation – depending on the position, this may be a research talk, a teaching demonstration, or another activity decided upon by the search committee;
   c. Meeting with the Head/Director;
   d. Forum with students;
   e. Forum with faculty members and colleagues in the Department, program, and/or relevant disciplines;
   f. Meeting with the Associate Dean, Faculty Affairs, and Director, HR, (not required for shortlisted candidates for Lecturer positions) – this meeting is to provide the candidate with information on the administrative aspects of a faculty appointment at UBC such as compensation, relocation and housing assistance, research support, tenure and promotion review processes, benefits, etc.;
   g. Meeting with UBC Housing and Relocation Services;
   h. Depending on the focus of the position, the candidates may meet with other Senior Leadership members, such as the Dean, Associate Deans, Assistant Deans, or external stakeholders (e.g. First Nations House of Learning, Centre for Accessibility).

4. The search committee Chair shall provide the Head/Director with full information about interview activities, once finalized. Invitations for all interview activities shall be sent to involved parties in a timely manner.

5. The search committee Chair and/or the support staff will prepare an evaluation form to be completed by faculty members, students, and others who have the opportunity to interact with the candidates (see Appendix L for a template).

6. Following the interview activities, a final meeting of the search committee shall be scheduled to rank the shortlisted candidates and determine a recommendation. At this time, the search committee Chair is encouraged to inform the committee that:
   a. Human Resources Development Canada (HRDC) allows selection committees to consider “fit” when evaluating applicants. “Fit” refers to a candidate’s ability to make a positive contribution to the unit’s environment. Committees must ensure that “fit” is not used inappropriately to indulge personal biases or to discriminate against candidates from equity-deserving groups.
   b. In hiring considerations, UBC has an Equipment Accommodation Fund to provide adaptive equipment for employees with disabilities.
   c. Shortlisted candidates are also assessing and making decisions about UBC.

**Step 10: Making the Recommendation of the Hire**

1. Our ultimate goal is to recruit the best available candidate in the pool. Following UBC Policy HR11 – Employment Advertising Policy, citizens and permanent residents of Canada should be given priority when all other qualifications and experience are relatively equal. In the event that the search committee recommends hiring a foreign academic who is not eligible for a Labour Market Impact Assessment (LMIA) Exemption, the search committee Chair must provide a list of the names of all applicants (noting which are Canadian citizens and permanent residents), accompanied by an explanation of why all Canadian citizens
and permanent resident applicants did not meet the advertised qualifications. Please direct questions about hiring foreign academics to the Director, HR, and ensure that the Head/Director is always kept aware.

2. If an excellent candidate is not identified by the search committee, units must be willing to extend and/or restart the search process.

3. Search committee members must maintain the confidentiality of all documents relating to the process and the work of the committee, and will retain, dispose of, or return any search-related documents and records to the search committee Chair and/or support staff in a manner that protects confidentiality and privacy of information. Upon the completion of the process, search committee members are expected to maintain continued confidentiality about the proceedings and deliberations of the search committee.

4. Following the final deliberations of the search committee, the search committee Chair will prepare a “hiring report” to send to the Head/Director with the recommendation for hire, which will include (see Appendix M: Sample report for recommendation for hire):
   a. An overview of the search and interview process;
   b. A rationale concerning the diversity of the applicant pool and the recommended hire;
   c. A ranked order of the candidates recommended for hire (if there are shortlisted candidates who are not recommended for hire, this should be clearly noted and they should not be ranked);
   d. A rationale for the recommended candidate(s) that makes clear links to their application materials with the final criteria, including how they distinguish themselves from the other shortlisted candidates;
   e. A rationale for the recommended candidate(s) vis-à-vis equity, diversity, and inclusion (EDI) that makes an evidence-informed argument about the relationship between the final criteria met by the recommended candidate(s), the shortlist, and the EDI goals for the search;
   f. A clear recommendation of the next step if the top-ranked candidate or the recommended candidate(s) declines the offer.

5. If the search committee Chair disagrees with the search committee’s recommendation for hire, the Chair can prepare a separate report to express their own recommendation to the Head/Director. If this happens, the Head/Director shall consult the Dean’s Office on the appropriate procedures to follow.

6. The Head/Director will review the hiring report. If the Head/Director approves the recommendation for hire based on the report provided by the search committee Chair, proceed to bullet 7.
   a. If the Head/Director has concerns about the procedures or process the search committee followed to arrive at the recommendation, the Head/Director should ask for more information from the search committee Chair and consult the Associate Dean, Faculty Affairs, and Director, HR, who will review the concerns with the Head/Director.
   b. If there are valid problems identified concerning the search committee’s decision-making procedures or process in reaching the recommendation for hire, the Associate Dean, Faculty Affairs, will report to the Dean who will then make a decision about next steps. These steps could include a range of outcomes, from clarification of procedures, revisiting of a key process, or even a decision to re-start the search process from the point of re-posting the job advertisement and/or forming the search committee. The Dean’s decision and accompanying rationale will be communicated to the Head/Director, and is not subject to appeal.
   c. The Head/Director will discuss the Dean’s decision with the search committee Chair or the full search committee, if necessary, and report the outcome to the Department.
7. In cases where the appointment is recommended at the rank of...
   a. Assistant Professor (tenure track), Assistant Professor of Teaching (tenure track) or Lecturer
      where the appointment file does not go to SAC for review, the Head/Director will convene a
      Department Standing Personnel Committee (DSPC) to obtain their views on this appointment (i.e.
      do we want to hire this candidate in our unit?). In the case of a Lecturer search, existing Lecturers
      should be invited to the DSPC. This vote serves as the formal consultation of an initial
      appointment as required by the Collective Agreement (Article 5.04, b) i) and Article 2.02 d) in Part 4).
      Note that all tenure stream faculty members of the unit are eligible to be consulted for the
      decision on an initial appointment, regardless of their ranks. The discussion at this meeting will
      only be around the top-ranked candidate recommended by the search committee to be offered
      the job, and must not be a review of other candidates. If the top-ranked candidate declines the
      offer, the same process should occur for the second ranked candidate (if applicable), and so on.
      In the case where a Head/Director is the search committee Chair with the Dean's approval, this
      DSPC meeting should be convened and chaired by the Acting Head/Director appointed for the
      purpose of overseeing this search (see Step 4A: Formation of the Search Committee).
         i. If this vote is positive, the Head/Director (or the Acting Head/Director, if applicable) must
            communicate the DSPC vote and the Head/Director’s personal recommendation (if
            different from the DSPC vote) on the appointment to the Dean’s Office, including the
            search committee Chair’s hiring report. If the recommendation is approved, the Associate
            Dean, Faculty Affairs, will make an offer to the candidate (see Step 11: Making the Offer),
            in consultation with the Head/Director and Director, HR.
         ii. If this vote is negative, the Head/Director is encouraged to contact the Dean’s Office for
             advice before making a formal recommendation.
   b. Associate Professor, Professor, Associate Professor of Teaching, or Professor of Teaching (with or
      without tenure) where the appointment file must go to SAC for review and the President’s
      approval, the Head/Director will convene a DSPC to obtain their views on this appointment (i.e.
      do we want to hire this candidate in our unit?). This vote serves as the formal consultation of an
      initial appointment as required by the Collective Agreement (Article 5.04, b) i) in Part 4). Note
      that all tenure stream faculty members of the unit are eligible to be consulted for the decision on
      an initial appointment, regardless of their ranks. The discussion at this meeting should only be
      around the top-ranked candidate recommended by the search committee to be offered the job,
      and must not be a review of other candidates. If the top-ranked candidate declines the offer, the
      same process should occur for the second ranked candidate (if applicable), and so on.
      In the case where a Head/Director is the search committee Chair with the Dean’s approval, this
      DSPC meeting shall be convened and chaired by the Acting Head/Director appointed for the
      purpose of overseeing this search (see Step 4A: Formation of the Search Committee).
         i. If this vote is positive, the Head/Director (or the Acting Head/Director, if applicable) must
            communicate the DSPC vote and the Head/Director’s personal recommendation (if
            different from the DSPC vote) on the appointment to the Dean’s Office, including the
            search committee Chair’s hiring report. If the recommendation is approved, the Associate
            Dean, Faculty Affairs, will make a conditional offer to the candidate (see Step 11: Making
            the Offer), subject to a successful review of the file following the University’s established
            appointment processes.
         ii. If this vote is negative, the Head/Director is encouraged to contact the Dean’s Office for
             advice before making a formal recommendation.
iii. If the conditional offer is accepted by the candidate, this marks the completion of the search process. From this point on, the Head/Director (not the Acting Head/Director, if applicable) will start the formal appointment and tenure review process (including, for example, having the candidate re-format the CV in the UBC template, developing a list of external reviewers and preparing a Summative Assessment of Teaching). The Head/Director will convene and chair DSPC meetings to review the file and two separate votes must be cast: (1) on the appointment at the intended rank and (2) on the tenure decision if applicable. Only eligible members as per the Appendix A of Part 4 of the Collective Agreement can be consulted on these decisions. This process, like any promotion and tenure files in the University, involves a review of the file at the Department, Faculty and University levels. Consult the Dean’s Office on the appointment review process for new hires.

**Step 11: Making the Offer**

1. Upon approval of the recommendation for hire sent by the Head/Director, the Associate Dean, Faculty Affairs, and Director, HR, will review the recommendation and determine the offer details, including starting salary, start-up funds, relocation allowance, and course releases.
   a. A draft offer will be shared with the Head/Director for feedback or suggestions before the offer is presented to the top-ranked candidate. The search committee Chair shall be kept apprised of the offer status (but not the offer content) and may be asked to provide information pertinent to the successful recruitment of the preferred candidate.
   b. In the cases of appointment at the rank of Associate Professor, Professor, Associate Professor of Teaching or Professor of Teaching (see Step 10: Making the Recommendation for Hire), the offer will be conditional, subject to a successful review of the file following the University’s established appointment processes.

2. The Associate Dean, Faculty Affairs, will communicate with the top-ranked candidate with the main offer items for an initial acceptance and, if necessary, negotiate the offer items with the candidate.

3. Once an email acceptance is received from the candidate, the Dean’s Office will prepare the formal detailed offer letter to be sent to the candidate for signature.

4. After the signed offer letter has been received, the Dean’s Office will notify the Head/Director and the unit support staff, who will then notify the unsuccessful applicants that the position has been filled (see Appendix N: Sample message to unsuccessful shortlist applicants). These tasks should be carried out as quickly and appropriately as possible.
   a. Careful attention should be paid to the timing of communications on hiring or other workload related matters with unsuccessful candidates who are ‘internal’ (current employees or students), to ensure they do not hear of the search outcome via other means.
   b. After the signed offer letter has been received and unsuccessful shortlisted candidates have been notified, the Head/Director shall arrange for communications of the search outcome to the search committee and a formal announcement about the appointment and search outcome.

5. After the signed offer letter is returned, the Dean’s Office will provide a copy and a summary of the offer items to the unit’s Administrative Manager, and identify steps to process the appointment in Workday and/or will work with the Head/Director on the formal review process for the successful candidate’s appointment, if applicable.
APPENDICES

Appendix A – Considerations for BIPOC targeted hires

To support your efforts to successfully recruit BIPOC scholars, we have created the following criteria, which are intended to act as a guide as you prepare job advertisements for targeted hires. The goal of these criteria is to entice outstanding BIPOC scholars to apply by making it clear that the advertised position is a targeted hire and enabling potential applicants to see themselves and their scholarship or educational leadership represented in the job advertisement:

- Where appropriate, convey directly through the job title that the broader focus of the position will be on BIPOC related scholarship or educational leadership (e.g., “Race, Ethics, and Physical Culture” or “Indigenous Teacher Education”).

- Indicate in the opening paragraph that the position is specifically intended for BIPOC applicants (e.g. “We are seeking scholars who are Black, Indigenous, and People of Colour (BIPOC) with an international reputation and a strong record of research or educational leadership in (insert a brief job description here).”).

- Throughout the advertisement, infuse the description of the expertise being sought with references to equity, diversity, inclusion, and decolonization (e.g. “The successful candidate is expected to demonstrate an exemplary track record of enacting and advancing equity, diversity, inclusion, decolonization, anti-racism, and social justice in their teaching, research, educational leadership and community engagement.”).

- Where appropriate, use language that emphasizes abilities and potential rather than solely focusing on demonstrated experience, thereby acknowledging that some highly qualified applicants may not have had opportunities to acquire experience for a variety of reasons (e.g. “The successful candidate will have a PhD in psychology and knowledge of advanced statistics.”).

In addition to the mandatory University Diversity Statement, include the BC Human Rights Code language in the advertisement to emphasize (once again) that the job is limited to BIPOC applicants only (e.g., “In accordance with UBC’s employment equity plan, and pursuant to Section 42 of the BC Human Rights Code, this position is limited to those who self-identify as Black, Indigenous, and people of color (BIPOC). Applicants must self-identify in the ‘Employment Equity Survey’ as BIPOC and provide their name in the Survey in order 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 (FIPPA). 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 UBC Faculty of Education Dean’s Office and only the names of those who identify BIPOC will be shared with the search committee. Responses will be stored in a secure database.”)
Appendix B – Considerations for search committee composition and rationale

As per Step 4A: Formation of the Search Committee, the Head/Director shall submit (a) the proposed composition of the search committee and (b) a rationale for the proposed composition to the Dean’s Office.

A) The following table is the recommended template for the proposed composition:

<table>
<thead>
<tr>
<th>Name</th>
<th>Rank</th>
<th>Department/School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member A</td>
<td>Professor (search committee Chair)</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member B</td>
<td>Professor</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member C</td>
<td>Associate Professor of Teaching</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member D</td>
<td>Associate Professor</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member E</td>
<td>Assistant Professor</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member F</td>
<td>Professor (external representative)</td>
<td>ARTS</td>
</tr>
<tr>
<td>Member G</td>
<td>Graduate Student</td>
<td>EDUC</td>
</tr>
<tr>
<td>Member H</td>
<td>Graduate Student</td>
<td>EDUC</td>
</tr>
</tbody>
</table>

B) The rationale should outline (i) how the committee membership includes the expertise and knowledge in the field of study and (ii) how its composition enhances the likelihood that equity, diversity, and inclusion (EDI) goals will be realized. Heads/Directors are encouraged to consider how a committee as a group has diverse and inclusive representation not only in terms of identities but also in embedding EDI knowledge, goals, and values within their expertise in teaching, research or educational leadership, and service in a given field of study. Providing a biography or identifiers for each proposed committee member is not considered a rationale for the proposed committee composition and will not be accepted.

It is recommended that the rationale is 1-2 paragraphs. Here are some guiding questions for the rationale:

- How does the proposed membership reflect the diversity of the Department/School/University?
- In what areas of scholarship (research and/or educational leadership) does the membership collectively have expertise and experience? Are any of these areas related to social justice, decolonization, or other related areas that might enhance EDI-related expertise?
- In what areas of teaching does the membership collectively have expertise and experience? Are any of these areas related to social justice, decolonization, or other related areas that might enhance EDI-related expertise?
- Are there any other areas – for example, community engagement – where the membership collectively has experience or expertise that is related to this search? If so, are any of these areas related to social justice, decolonization, or other related areas that might enhance EDI-related expertise?
- How is the proposed membership positioned to enhance the likelihood that EDI goals of the program/area, Department/School, and/or Faculty will be realized?
*Sent on behalf of the Chair of the search committee, Dr. X*

Dear [applicant],

Thank you for your application for the [X position in X department/school], Faculty of Education at the University of British Columbia. We very much appreciate your interest and will keep you updated as our search proceeds. If you have questions about the process, please do not hesitate to contact me.

The University of British Columbia hires on the basis of merit and is committed to employment equity. As part of our strategy to recruit diversely from the broadest possible talent pools, we collect information to assist us in determining if we are achieving these goals.

You will receive an email from the Faculty of Education Dean’s Office in due course regarding our Employment Equity Survey, which we will require you to complete to finalize your application.

If you have any immediate questions or concerns, please do not hesitate to let us know.

Sincerely,

[Support Staff]
Appendix D – Template message to applicants (longlist or shortlist) with intention to request references

Dear (applicant),

Thank you very much for applying for the X position in X department/school, Faculty of Education at the University of British Columbia. We received many strong applications from highly qualified candidates. I am pleased to inform you that your application is still being actively considered.

At this stage, we will be contacting the three referees that you listed in your application. Please contact me immediately if you have concerns about our doing so.

Sincerely,

[Chair of the Search Committee]
Appendix E – Template message to referees for letters of reference

Dear [referee],

[Candidate] has applied for the [X position in X department/school], Faculty of Education at the University of British Columbia. Please find attached the job advertisement for the position, which describes the criteria.

We are now seeking letters of reference for candidates advancing in the search process. [Candidate] has listed you as someone who is willing to provide a letter of reference. I would appreciate it very much if you could provide a letter in which you comment candidly on [candidate]’s suitability for this position. Specifically, please address the following:

- [Primary criteria for the position]
- 
- 
- 

We are requesting that you send your letter of reference by [date] to [X (name, position)] via email to [X@ubc.ca]. Thank you very much for assisting us in the search for our new colleague.

Sincerely,

[Chair of the Search Committee]
Appendix F – Sample report for recommendation for shortlist

[Sent to Head/Director, from search committee Chair.] Please accept the following report of the recommendation of the search committee, and its procedures/process, regarding the proposed shortlist.

[List of committee members.]
The search committee for the position of Assistant Professor of Teaching in Counselling Psychology met on March 1, 2021 to discuss the members’ initial assessments of the applicants to this position. Committee members evaluated the applicants’ application materials over a 2-week period and provided the Chair with their initial assessment by grouping each candidate as either A (Yes), B (maybe), or C (No). Groupings were collated and presented to the committee on April 1, when all members were present. [Elaborate on procedure and process, as required.]

A. The total number of applications and the breakdown of international and Canadian applicants
We received a total of 14 applications: 11 Canadian (citizens or permanent residents) and 3 international applicants.

B. Rationale concerning the diversity of the applicant pool and the shortlist
The committee felt the diversity of the applicant pool was appropriate and noted that Canadian applicants are representative of the Canadian population. According to the responses from the Equity Employment Survey distributed to the applicants, gender identity was approximately evenly split between women and men. A majority of applicants identified as racialized. Two of the respondents identified as a member of the LGBTQ+ community, and 2 identified as an individual with an impairment/disability. Diversity statements were provided by all applicants and these were carefully scrutinized by the committee to evaluate the expertise or experience of the candidates regarding their approach to diversity and inclusion in their professional practice. Shortlisted candidates were among those deemed to have thoughtful diversity statements, in addition to compelling records of teaching excellence and demonstrated or potential educational leadership qualities. [Comments on the diversity of the applicant pool and the list of shortlisted candidates.]

C. Profile of the Shortlisted Candidates
Following 2-hour deliberation on April 1, the committee arrived, by consensus, on the following 3 shortlisted candidates to invite for full interviews. All shortlisted candidates are Canadian citizens or permanent residents. The rationale for each candidate is presented below, in alphabetical order: [Not all individual summaries included. Rationale (Including EDI) for only one of the three candidates included as an example.]

Dr. Y is currently a full-time Lecturer in the Department of Teacher Education at B University (BU). She earned a PhD in Counselling Psychology from an APA accredited program at University C in 2010 and has since had extensive teaching experience in both Adult and Teacher education courses at the undergraduate and graduate level. Notably, some of the courses she has taught seemed to align with those listed in the Job Ad for this position. Dr Y. has been the recipient of multiple teaching awards at BU, including a recent award for mentoring junior colleagues. She has also been involved in curriculum renewal of Teacher Education courses, in particular, a recent project that also received partial funding from the Ministry of Education. Dr. Y provided summaries of quantitative and qualitative evaluations of undergraduate and graduate courses she taught, and the committee noted that the evaluation scores and overwhelmingly positive student feedback demonstrated her strong commitment to teaching excellence. Her contributions to Educational Leadership at her current position include an online certification program in counselling for in-service teachers and new immigrants. Dr. Y’s references spoke highly of her accomplishments, excellence in quality of work, and collaborative spirit.

With regard to EDI, Dr Y’s Philosophy of Teaching clearly articulated her understanding of the importance of incorporating EDI priorities in the classroom. Her Diversity statement, and CV, highlighted a strong track record of advancing EDI initiatives through scholarship and teaching. As well, her mentorship of minority and underrepresented students in the Teacher Education Program stands out as one of the many examples of her consistent record of supporting values of inclusion and diversity. Given the decolonization and curriculum renewal projects she is currently involved in, Dr. Y offers the promise of being a contributing member to the EDI goals of the department and Faculty. Additionally, her diversity statement clearly articulates her plan to emphasize the intellectual contributions of scholars from underrepresented groups in her teaching. Dr. Y received consistently high ratings on the EDI rubric from committee members.
Appendix G - Template message to applicants not on the longlist or shortlist

Dear [candidate],

Thank you very much for applying for the X position in X department/school, Faculty of Education at the University of British Columbia. We received many strong applications from highly qualified candidates. The search committee has endeavoured to identify those whose academic preparation, professional experience, and teaching skills best correspond with the needs of our programs and Department.

I regret to inform you that the search committee has decided not to proceed further with your application. On behalf of the search committee, I want to thank you for your interest in the position and to acknowledge your time and effort in preparing materials for this application.

Sincerely,

[Chair of the Search Committee]
Appendix H - Template message to shortlist applicants inviting them for an interview

Dear [candidate],

I am very pleased to inform you that you have been shortlisted for the X position in X department/school, Faculty of Education at the University of British Columbia. We thank you for your application and invite you to visit our Department, the Faculty, and UBC campus on [dates]. The purpose of the visit is to assess your suitability for our position and to give you the opportunity to ask questions about the position and the Department, Faculty, and University.

We will send a detailed schedule of your visit upon confirmation of your availability. The visit will include an opportunity for you to provide a public presentation to the Department/School/unit of your scholarship/research/teaching program. The search committee will conduct a 60-minute interview, and you will have an opportunity to meet with the Associate Dean, Faculty Affairs, with students, with the Department Head/School Director, and with me as search committee Chair. The detailed schedule will provide more complete information about the people with whom you will meet.

For your interview, you should be prepared to answer questions about your scholarship, teaching, graduate student supervision, and service in relation to the diverse contexts of the University of British Columbia. For your presentation, you should plan on delivering about 40-45 minutes of content. [Edit for the specific context of the search] We ask that about 80% of the presentation focus on your scholarly activity and trajectory and that about 20% be dedicated to addressing how your research and teaching interests link with the mandate of the UBC Faculty of Education and our Department’s programs. We will be interested to learn how you see yourself contributing to graduate education and teacher education in the Faculty of Education. Our website X.educ.ubc.ca will be helpful in orienting you to our Department.

Please make your travel arrangements with X, providing your preferred flights, frequent flyer number, the spelling of your name as it appears on your identification/passport, and contact information. X will book accommodation for you for one or two nights, as needed, arriving the day before the interview. We will book your accommodation at St. John’s College, located on campus (2111 Lower Mall); the College offers quiet, comfortable and well-appointed guest rooms for academic visitors to UBC. If you require other arrangements, please contact X. We will reimburse you for any additional expenses including taxi fares and meals not provided during the visit. All claims must be accompanied by itemized, original receipts. UBC’s maximum rates for meals, including tax and gratuities are: breakfast ($14), lunch ($16) and dinner ($30).

The interview and other activities will be held at the University of British Columbia and the Department/School. This is a link to a map and information about the location of our building: [Link to appropriate UBC map].

I would appreciate confirmation of your ability to visit us on the date proposed. If you could confirm within the next 48 hours, it would be much appreciated. If you prefer to communicate by telephone, my assistant can be reached at 604-82X-XXXX.

Sincerely,

Chair of the Search Committee

Faculty of Education
Updated: September 2022
Appendix J - Template message to shortlist candidates to confirm schedule

Dear [candidate],

We are looking forward to your upcoming visit to the Faculty of Education at UBC on [dates]. In advance of your visit, please confirm the following:

1. We are seeking your permission to video record your Public Presentation so that faculty members, students, and staff who are unable to attend your session may view it at a later date. An email to our staff support, [name] at [email], stating that we have your permission will suffice. The recording will be stored in UBC password-protected systems and destroyed 1 year following the search completion.

2. If you require any technical equipment or accessibility devices, please let us know.

3. If you require us to load your PowerPoint presentation onto a UBC device, please provide me with your PowerPoint presentation in advance. Additionally, know of anything you require for your Public Presentation.

4. We ask that you forward a brief biography and a title for your Public Presentation, in advance of the visit.

Additionally, below are a few items related to your visit:

- I have attached the itinerary for your visit. We have made arrangements for you to meet individually with members of the senior leadership team, students, and faculty over the course of your time here, including a public presentation by you to faculty members and a focused interview with the search committee. Details about the public presentation were included in our previous email.

- [name] will escort you to each location during the time you are here with us. At the end of the first day the search committee will accompany you to a dinner at [name].

- Please retain all receipts for your expenses such as meals, transportation or other incidental costs so that our finance department can reimburse you for any expenses you may incur. If you would prefer reimbursement in a currency other than Canadian dollars, please let us know. Send all of your original receipts, in one envelope:

  Dean's Office Reception
  2616 – 2125 Main Mall
  Vancouver, BC  V6T 1Z4

- In case of an emergency or major issue, please contact one of the following people:
  - [name]
  - [name]

If you have any questions, please let me know. On behalf of the Faculty of Education and UBC, I hope you enjoy your time in Vancouver and we look forward to your arrival.

Sincerely,

[Chair of the Search Committee]
### Appendix K - Sample schedule for interview activities

#### Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Meeting Details</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 10:00 am</td>
<td>Breakfast with search committee Chair</td>
<td></td>
</tr>
<tr>
<td>10:00 – 10:30 am</td>
<td>Travel Time</td>
<td></td>
</tr>
<tr>
<td>10:30 – 11:00 am</td>
<td>Preparation time for Public Presentation</td>
<td></td>
</tr>
<tr>
<td>10:30 am – 12:00 pm</td>
<td>Public Presentation and Questions</td>
<td></td>
</tr>
<tr>
<td>12:00 – 12:30 pm</td>
<td>Break &amp; Travel Time</td>
<td></td>
</tr>
<tr>
<td>12:30 – 2:00 pm</td>
<td>Lunch with Head/Director</td>
<td></td>
</tr>
<tr>
<td>2:00 – 2:30 pm</td>
<td>Travel Time</td>
<td></td>
</tr>
<tr>
<td>2:30 – 3:00 pm</td>
<td>Meet with Associate Dean, Faculty Affairs, and Director, HR</td>
<td></td>
</tr>
<tr>
<td>3:00 – 3:30 pm</td>
<td>Break &amp; Travel Time</td>
<td></td>
</tr>
<tr>
<td>3:30 – 5:00 pm</td>
<td>Forum with Department faculty members</td>
<td></td>
</tr>
<tr>
<td>5:00 – 6:00 pm</td>
<td>Break &amp; Travel Time</td>
<td></td>
</tr>
<tr>
<td>6:00 – 8:00 pm</td>
<td>Dinner with members of the Search Committee</td>
<td></td>
</tr>
</tbody>
</table>

#### Day Two

<table>
<thead>
<tr>
<th>Time</th>
<th>Meeting Details</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 9:30 am</td>
<td>Preparation time for Interview</td>
<td></td>
</tr>
<tr>
<td>9:30 – 11:00 am</td>
<td>Interview with search committee</td>
<td></td>
</tr>
<tr>
<td>11:00 – 11:30 am</td>
<td>Break &amp; Travel Time</td>
<td></td>
</tr>
<tr>
<td>11:30 am – 1:00 pm</td>
<td>Forum with students</td>
<td></td>
</tr>
<tr>
<td>1:00 pm</td>
<td>End of Interview Activities</td>
<td></td>
</tr>
</tbody>
</table>
Appendix L - Template feedback form for shortlist applicants

FEEDBACK ON SHORTLIST CANDIDATES

TITLE OF POSTION

Your name: (optional) ________________________________________________

Your position: Tenured/Tenure-track Faculty ☐ Lecturer/Sessional Instructor ☐ Staff ☐ Student ☐

Candidate presentation(s) attended/viewed: Dr. X ☐ Dr. X ☐ Dr. X ☐

Basis for comments on assessment (check one or more of the following):

☐ Attended and/or viewed Public Presentation by the candidate
☐ Attended and/or met with the candidate during a faculty or student forum
☐ Reviewed candidate’s CV
☐ Other (please specify)

Comments:

Do you have/had any association (conflict of interest) with the candidate?

☐ I have not had an association with Dr. X
☐ I have had an association with Dr. X. Please explain:

Signature (optional) ________________________________________________

Please return by email to x@ubc.ca no later than (deadline).
Appendix M - Sample report for recommendation for hire

[Sent to Head/Director, from search committee Chair.] The search committee for the position of Assistant Professor in Physical Education (EDCP) has completed the search process and is ready to make a recommendation. The recommendation, rationale for the decision, and details about the procedure we followed are detailed below.

Search Committee Membership:
The original search committee was composed of eight members. In March 2021, Member B recused herself because of a conflict (she had been asked to provide letters of reference for two candidates). The Department Head asked Member J to join the committee. The Dean’s Office approved these changes on March 5, 2021, and the search process continued uninterrupted.

Ranked List of Shortlisted Candidates:
The three short-listed candidates, listed below, were developed from a pool of 15 applications (13 Canadian citizens or permanent residents and 2 International) received for the position. All shortlisted candidates are Canadian citizens or permanent residents. The committee ranks the candidates for hire as follows:
1. Dr. X
2. Dr. Y

The committee does not believe Dr. Z should be recommended for hire, so this candidate is not included in the ranking.

Recommendation and Rationale:
The committee carefully reviewed the application documents, feedback, research presentation, and interview vis-à-vis the criteria for the three shortlisted candidates and unanimously agreed on the ranked list. The rationale for each candidate is discussed below.

Candidate: Dr. X
[Rationale vis-à-vis the final criteria used for the search clearly linking criteria to candidate’s education, background, and experience (typically 1-2 paragraphs). Also, add an EDI part to the rationale.]

Dr. X has taught in multiple contexts. She was an elementary school teacher for two years, and a high school teacher for 7 years. Her five-year post-secondary experience involved teaching a wide range of courses at both graduate and undergraduate level, some of which she has developed for the pre-service Physical Education teachers.

Innovation in Research...
Extensive Experience in Program Administration...
[Continue with other reasons for recommending Dr. X.]

[An example of EDI part of the rationale for Dr. X is provided below as an example. Also, see text from Job Ad for EDI commitment of unit, Faculty and UBC when writing the rationale.]

The committee noted that Dr. X’s approach to culturally responsive pedagogies and inclusive teaching were demonstrative of her extensive knowledge and effective application of EDI priorities in her praxis. Her CV and diversity statement had several examples of her track record of engaging with EDI in her work. For instance, her attention to incorporating principles of UDL (Universal Design of Learning) in teaching, and efforts to include disabled students in outdoor experiential classroom activities were laudable. Her recent SSHRC grant that will launch a series of case studies investigating how decolonizing research training empowers researchers is another example of her dedication to values of equity, inclusion, and decolonization. In her presentation to the department, and interview with the committee, Dr X. clearly articulated her intentions and plans to align her efforts to the Faculty’s EDI priorities in both research and teaching. Her consistent and strong record of advancing success of all learners convinced the committee that Dr. X would make significant future contributions to the Faculty’s and University’s EDI goals. [Include comments concerning the diversity of the applicant pool and the recommended hire.]
Candidate Dr. Y
[Add rationale for second ranked candidate, Dr. Y, with EDI rationale.]

[A commentary on the rankings of the candidates - why Dr. X was ranked higher than Dr. Y.]
Whereas Dr. Y also met all the criteria for the position, the committee believed that Dr X far exceeded Dr. Y on all criteria. Dr. X was an elementary school teacher for two years, and a high school teacher for 7 years. Her five-year post-secondary experience involved teaching a wide range of courses at both graduate and undergraduate level, some of which she has developed for the pre-service Physical Education teachers. In comparison, Dr. Y was an elementary school teacher for 5 years, but a majority of her ten-year post-secondary teaching experience has been part-time. [Add other reasons.]

Candidate Dr. Z
[Explanation why shortlisted candidate Dr. Z was excluded from the rankings – example text below.]
After considerable discussion, committee members decided that, although Dr. Z showed strong potential for the position and initially met the criteria to be shortlisted, his presentation and interview responses did not demonstrate to the committee his ability to meet the criteria for the position. Committee members noted a lack of depth in Dr. Z's understanding of, and engagement with, current research around Outdoor Experiential Education. In addition, feedback from graduate students suggested that the areas of Dr. Z's research profile would not contribute to the expansion of research areas in the field of Physical Education in the department - a major focus of the Job Ad. [List other reasons, as applicable.] Consequently, Dr. Z was excluded from the rankings.

Final Hiring Recommendation:

Overall, the search committee considers Dr. X to have collectively the most directly relevant post-secondary teaching and research experiences to the position of all applicants. She ranked consistently higher than the other shortlisted candidates on the EDI criteria for the search. In addition, she would provide valuable and much-needed concentrated focus on curricular innovations, and new areas of research inquiry in Outdoor Experiential Education in the department. The recommendation of the committee is to offer Dr. X the position of Assistant Professor in Physical Education in EDCP.

If Dr. X declines the offer or the position is not offered to her, the committee recommends Dr. Y as the second choice. In the event that Dr. Y should also decline the offer, the committee recommends that the job be re-posted to attract a new pool of applicants.

Summary of the Procedures followed by the search committee:
The committee’s procedure was as follows:

- November 2020: The job ad was posted with an application review date of February 15, 2021
- February 2021: The Dean’s Office provided an orientation to the search process; following this, the search committee confirmed the final criteria. These criteria were subsequently sent to the Dean’s Office for feedback and approval.
- March 2021: The committee met via Zoom to discuss the applicant files, at which time members reached consensus regarding a recommended shortlist (Drs. X, Y, and Z). In addition, the committee drafted interview questions, which were further refined through email.
- March 2021: Short-listed candidates were invited for interview activities.
- April 2021: A search committee meeting was held to discuss the presentations and interviews, as well as to consider feedback from faculty and students; the committee arrived at unanimous recommendation for hire.

Please let me know if you would like further information from the committee or if you have any questions about our recommendation or the procedure we followed.
Appendix N - Template message to unsuccessful shortlist applicants

Dear [applicant],

Thank you for visiting the University of British Columbia to interview for X position in X department/school, Faculty of Education at the University of British Columbia. We were impressed by the group of shortlisted applicants; each presented a unique and attractive set of skills, abilities, and interests. The strength of your candidacy was noted.

We have now completed our search and after careful deliberation, we have made the difficult decision to select another candidate. We would like to express our appreciation for your interest and for giving our Department the opportunity to meet you and learn about your work.

On behalf of my colleagues, I wish you well in your future academic endeavours.

Sincerely,

Chair of the Search Committee