

Checklist for Academic Searches

(9 June 2021)

Correspondence

1. At all steps in the process, correspondence will be by email and the subject line will include as appropriate: a) employee name, b) position, c) department, d) position number
2. **All documents must be printed to PDF after each signature is obtained (to avoid the loss of signatures) and then attached to the email.**

Cessation

1. Normally the Department Head (**DH**) advises the Dean that a member is resigning or retiring and advises if a Waiver of "six-month notification to resign" is required. DH cc's AA and DA
2. If required, the Dean's Confidential Assistant (**DA**) prepares a Waiver request for the Dean's signature and forwards to the Provost for approval.
3. The DA requests that the Department Administrative Assistant (**AA**) prepare a Cessation Form with the final date of employment.
4. The AA prepares the Cessation Form, including the DH signature, and submits it, along with the resignation letter, to the DA for Dean's approval. *(Remember PDF documents by e-mail only.)*
5. The DA forwards the Cessation Form, the resignation/retirement letter, and where appropriate, the approved Waiver and the Dean's memo approving the Waiver, to HRIS for processing. A copy is placed in the member's personnel file by the DA. DA cc's DH and AA.

Recruiting

1. The process is usually initiated by discussions of the Dean with the DH after which the Dean verbally or in a letter to the DH approves a search.
2. The DH holds a Collective Agreement Clause 18.B.2 meeting of the faculty members to advise on the general area of the search and to elect 5 academic staff members with faculty rank to recommend to the Dean to serve on a search committee.
3. ***The DH and AA meet with the DA to discuss the steps in the search process.***
4. The DH prepares the Request to Fill (RTF) and position justification and sends them together to the DA, with a copy to the AA.
5. The DA reviews the documents for completeness and accuracy, asks the Business Manager to review the documentation and then forwards it to the Dean for review and signature.
6. The DA forwards the RTF and Justification to the Provost's Office for approval.
7. The approved RTF and position number is returned to the DA, who forwards them to the AA and DH along with an advertising template appropriate for the position. Subsequent, inquiries to the DA about the position must include the position number.
8. The DH forwards to the DA the names of the 5 academic members elected to serve on the Search Committee to the DA along with the name of one graduate student. The Dean selects 3 of the 5 names provided by the department and one external committee member. Other members may be selected by the Dean in special circumstances The DH is usually named as the Chair.

9. The DA notifies by letter the Chair and the committee members of the formation of the Search Committee. The Chair subsequently notifies department faculty members.
10. The Chair promptly calls the first meeting of the Search Committee to prepare a draft advertisement using the template provided by the DA.
11. The Chair forwards the updated draft advertisement to the DA and Dean for approval.
12. Once approved by the Dean, the DA sends it to the DH and AA who prepares the academic advertisement form in conjunction with the DH/Chair, and forwards it along with the approved advertisement to umcareers@umanitoba.ca. The AA also requests access to the UMCareers portal to monitor for any applications and to subsequently e-mail any such applicants to direct the application to the correct location.
13. UMCareers approves or requests amendments, and includes the link to the Employment Equity Questionnaire. Once finalized UMCareers sends the advertisement links to the DH for inclusion in the acknowledgement letter (see **Appendix 1**).
14. The AA monitors the appearance of all advertisements listed on the Academic Advertising Form and takes a screenshot of the postings showing the date it appears and, subsequently, a second screenshot on the date of closing. The screen shots are required in the final phase as proof that the posting existed for 30 days.
 - To hire a Canadian, we require documentation of advertising for external searches in *University Affairs* and *CAUT Bulletin*.
 - To hire a non-Canadian, we require documentation of all advertising (ie. all locations listed on the Academic Advertising Form, and all *ad-hoc* locations).
15. For postings that do not go through UMCareers, the AA works with department members to place the advertisement such as on society web sites and commercial sites recommended by the Committee. The AA takes screen shots of all such postings. The AA also sends the advertisement to all appropriate university and college departments in North America.
16. The Chair (or designate) monitors applications regularly and replies to each applicant with an acknowledgement letter (see **Appendix 1**) containing the EEQ link.

Selection and Appointment of Candidate

1. Once the short list of candidates is set and approved by the Dean, the Chair contacts each candidate to schedule an interview time.
2. The AA assists the Chair in organizing meetings, but should not attend any of the seminars or meetings.
3. ***Once the interviews are complete, the Chair and AA meet with the DA to review the steps in appointment approval process.***
4. The ranked list of candidates is reviewed by the Dean and then the Chair prepares the Summary of Search, the Committee Report (CR), and if a non-Canadian is being recommended, a Report on Canadian Applicants. The CR should specify that, if candidate 1 declines the offer, candidate 2 should immediately be offered the position, and similarly to candidate 3. The AA may assist the Chair as appropriate.

5. The Chair, with the assistance of the AA, sends the following documents to the DA, in one e-mail, if possible (remember subject line requirements).
 - Summary of Search (ensure applicant breakdown is complete including non-binary)
 - Committee Report
 - CVs of recommended top-ranked candidates
 - A copy of the UMCareer approved advertisement
 - Proof of all advertising if a non-Canadian is a selected preferably in one PDF, or listed as adv1, adv2, etc., if all ads cannot be compiled into one PDF.
 - Report on Canadians (if a non-Canadian is a successful candidate)
6. The DA reviews the documentation for completeness and accuracy and obtains a proposed salary range for each candidate from the Budget Manager.
7. The DA then prepares a "Dean's recommendation memo" for signing and forwards the package to Dean for approval and subsequently to the Provost's Office.
8. Upon approval and return from the Provost, the DA forwards the package to the Chair and AA along with a template Letter of Offer (LoO) appropriate for the position.
9. The Chair consults with the Dean with regards the terms to be included in the LoO and the AA prepares the LoO.
10. The AA has the LoO signed by the Chair and then sends it to the DA, who reviews it for accuracy, before sending to the Dean for review and signature. The DA returns it to the AA and the Chair.
11. The Chair sends the letter to the candidate who signs and returns it to the Chair.
12. If the candidate is non-Canadian, please proceed to **Appendix 2**.
13. With the signed LoO returned, the AA, with the assistance of the Chair, completes the Academic Appointment Form (AAF) and sends the following package in one e-mail to the DA ensuring that only final copies of all documents are included:
 - AAF
 - Summary of Search
 - Signed LoO
 - CV
 - Personal Information Form (new hire),
 - Copy of SIN (only if a #9 SIN or changing from a #9 SIN to a permanent resident SIN).
 - Copy of work permit (if applicable),
 - Copy of Permanent Resident Card (for permanent residents only),
 - If Removal Allowance exceeds \$6K, approval memo from the Provost
14. The DA reviews the AAF and sends it to the Business Manager for review and signing.
15. The DA collates the hiring package into one PDF document in the order shown below after reviewing all items for accuracy and completeness and forwards the package to HRIS.
 - Academic appointment form
 - Summary of Search
 - Signed letter of offer

- Personal Information Form (new hire)
- Curriculum Vitae (CV)
- If Removal Allowance exceeds \$6K, approval memo from the Provost
- Copy of SIN (only if a #9 SIN or changing from a #9 SIN to a permanent resident SIN).
- Work Permit (if applicable)
- Copy of Permanent Resident Card (for permanent residents only).

Appendix 1

Dear Dr. <insert name>,

Thank you for your application for the position of Professor within the Department of <insert department>, Faculty of Science. The Search Committee will be convening on <insert date> to review applications and to prepare a shortlist.

The University of Manitoba's employment practices are guided by policies on the priority to hire qualified Canadians and we are also committed to achieving an equal opportunity workplace.

To this end, please go to the following link to complete an employment equity questionnaire: <insert link to questionnaire>. We would be most appreciative if you could complete this questionnaire online. Please note that the status of your citizenship is required and that the equity information is voluntary.

Thank you for taking the time to fulfill this request and for your interest in our University. Please take a few minutes to learn more about what the University of Manitoba and the City of Winnipeg have to offer by reviewing our website at https://umanitoba.ca/admin/human_resources/employment/why-um.html and <https://www.tourismwinnipeg.com/>.

Sincerely,

Appendix 2

1. The DA consults with the Chair and the immigration specialist to determine what documentation is required to hire the non-Canadian.
2. The DA advises the AA if a Labour Market Impact Assessment Application High-Wage and Low-Wage Positions (LMIA) is required and sends the AA an up-to-date LMIA template.
3. The AA prepares a LIMA (only complete pages 3- 10 starting at job offer information - the 3rd party section on that form is not required).
4. The AA sends the completed LMIA and the signed LoO to the DA.
5. The DA forwards the package to the Provost for submission to Service Canada for approval.
6. The DA notifies the Chair and AA of the approval by Service Canada.
7. The AA then prepares the AAF and hiring package as outlined above.