Process Name	Manage the Search Summary Process
Summary or Description	Outlines activities required to access, complete, and report on Search Summary Form Information. The Search Summary Form itself is a new addition to the employment recommendation and application package that is prepared for new MUFA Faculty appointments. To ensure EDI principles and practices are applied during the recruitment, assessment and selection stages, the Chair or Committee Chair is asked to chronicle the experience by responding to a set of questions on the form. The Dean then indicates endorsement of the candidate of choice within the form. The Search Summary Form is included in the final Employment Recommendation package. The form contents are entered into Mosaic and aggregate reports are presented to Senate Committee on Appointments **(SCA)** at specified intervals (6 months after July 1st effective date, and every year, thereafter). **Goal for Process Work**: an easy, simple process for **incorporating new work** into the recruitment and selection process.
High Level Process Steps	 Note: Grey step indicates existing process elements
Inputs	Successful Candidate(s) Identified for a specific Job Opening
Outputs	Search Summary Report is presented to SCA outlining EDI practices employed, at the Faculty and Department Levels
Roles	Chair (Department, Committee), *Designate, Dean, Faculty Administrator, Department Administrator, Employment Equity (EE) Team, Provost's Office, Dean of Graduate Studies, Faculty Relations, Senate Committee on Appointment Note 1: *Designate may be the Search Committee, Department Administrator, HR Coordinator, Chairs Assistant, depending on Task Note 2: Given the size of FHS, the work activities conducted by Faculty Administrators are typically performed by the FHS Department Administrators
Tool/Platform	Provost's Office website Faculty Relations website Mosaic/Self Id Analysis Hub
Trigger	Chair (Committee Chair) is ready to complete the search summary form

Process Name	**Manage the Search Summary Process**
Template	Search Summary Form Template

Exception A:	Is more than one Candidate of Choice Selected for a position?
	Scenario 1: Multiple positions are sought with the same requirements detailed in the job description
	Scenario 2: An additional successful candidate was identified during the selection process
	In both scenarios,
	  - all positions will have their own job opening #
	  - all successful candidates follow the same recruitment, assessment and selection experience

Exception B:	Is this a FHS Candidate of Choice? Sign-off is not required from the Dean of Graduate Studies for FHS Candidates

Capability Matrix

Capability	Chair	Dean	Faculty Admin	Depart. Admin	EE Team	Provost's Office	Faculty Relations	Dean of Grad Studies	SCA
Access Search Summary Form template (Provost's Office)	x	x	x	x	x	x	x		
Access Search Summary Form template (Faculty Relations)	x	x	x	x	x	x	x		
Access Self-ID Analysis Hub	x	x	x	x	x	x	x		
Access (Submit) Search Summary Form link			x	x					
Enter/Save Search Summary Form Information			x	x	x				
View/Edit Search Summary Form Information by any Job Opening ID					x				
View/Edit Search Summary Form Information for a Job Opening ID within specified Faculty			x	x					
Generate Query Reports by Job Opening ID, Department/Faculty					x				

Manage Search Summary Process Flow: See Flow By Role

Activities by Process Step

Process/Role	Step	Task Description
Activity	**Complete Search Summary Form**	

Chair/Delegate	Access Search Summary Form Template	• Locate Search Summary Form template on Provost's Office website/Faculty Relations Office's website
		Provost Office url: https://www.mcmaster.ca/vpacademic/FormsMainPage.html
		
		Faculty Relations Office url: https://fhs.mcmaster.ca/facultyrelations/full_time_recruitment_appointment.html
		
		• Download Search Summary Form fillable pdf
		
		Notes:
		  - The Search Summary Form template is centrally located to facilitate ease of access and promote version control
		  - Depending on department, the delegate may be a department administrator or search committee chair
		  - The template is in a savable pdf format

Chair/Delegate	Populate Position Information	• Open Search Summary Form template
		• Enter the following information:
		  o Position Title
		  o Position Number
		  o Faculty (name)
		  o Department (name)
		  o Department Chair (name)
		  o Option Committee Chair (name)
		    ▪ Only enter name if it is not the same as the Department Chair
		  o Candidate of Choice
		  o Starting Date

Chair/Delegate	Populate Process Checklist Information	• Follow the prompts within the form and complete the questions in reference to the following phases:
		  o Preparation
		  o Recruitment
		  o Assessment
		  o Selection
		Notes: See Search Summary Form Template

	Exception A	If there is more than one Candidate of Choice? If yes, complete a Search Summary Form for each Candidate of Choice

Chair/Delegate	Complete Form for each Candidate	• Ensure that all candidates have a unique Job opening number within Mosaic
		• Follow existing process to create unique job opening for each successful candidate/the number of candidates required for a position
		   o Today this is accomplished in two ways:
		      ▪ at the beginning of the job search, Job Opening IDs are set up to accommodate the number of individuals required for a position
		      ▪ once multiple candidates are identified, unique job openings are created for each candidate
		• Fill out form for each candidate

Chair/Delegate	Send Form to Dean's Office	• Save/Print Form • Provide form to Faculty Administrator/Department Administrator Note: This form will now accompany all the other materials that are sent for Dean approval (i.e., employment recommendation form, interviews schedules, rubrics, comments from Dean and associated Deans and Provost Representative, etc.)
Activity	**Compile Employment Recommendation Package**	
Faculty/ Department Administrator	Assemble Employment Recommendation Package	• Prepare employment recommendation package elements o The package now includes the search summary form for Dean's endorsement • Provide employment recommendation package to Dean

Dean	Review and Endorse Search Summary Form	• Receive the employment recommendation package
		• Review responses within the Search Summary Form
		• Demonstrate Dean's Approval as follows:
		   o Enter Name
		   o Indicate the Search Summary Form Report was reviewed, and the candidate of choice is endorsed
		• Complete all other elements of the recommendation package, as is done today
		Note: No change to how the other items within the employment package are reviewed/approved

Dean	Return Recommendation Package to Faculty/Department Administrator	• Return completed search summary form, along with the other recommendation package elements to Faculty/ Department Administrator
Faculty /Department Administrator	Receive Completed Recommendation Package	• Receive/collect completed Recommendation Package from the Dean • Prepare Recommendation Package for Dean of Graduate Studies or if FHS, Faculty Relations Office
	Exception B	• Is this a FHS Candidate of Choice? – If yes, STOP - Next Stage is Offer Letter Process (as is done today)
Faculty/ Department Administrator	Send Recommendation Package to Faculty Relations Office	• Receive employment recommendation package from the Dean • FHS Candidates of Choice do not require approval from the Dean of Graduate Studies • Once Dean approval is received, the recommendation packages is sent to the Faculty Relations Office

Faculty Relations Office	Receive Recommendation Package	• Receive recommendation package • Prepare file for candidate • Proceed with existing Offer/President's Letter Process
	Obtain Sign-off on Candidate of Choice	
Faculty Administrator	Send Recommendation Package to Dean of Graduate Studies (Vice Provost)	• Receive the approved employment recommendation package from Dean • Save/File recommendation package elements • Send/Provide recommendation package to the Dean of Graduate Studies (Vice Provost) Note: This may be in the form of email or provided as hard copies
Dean of Graduate Studies	Provide Approval to Proceed with Candidate of Choice	• Receive employment recommendation package from Faculty Administrator o Includes the Search Summary Form • Review the employment recommendation package • Sign-off on the Faculty appointment
Dean of Graduate Studies	Send Recommendation Package to Provost's Office	• Inform the Faculty Administrator of the approval • Provide recommendation package to Provost's Office Note: Today informing the Faculty Administrator may occur in two ways: o Via email where the Faculty Administrator is cc'd on the exchange with the Provost's Office o Tacit approval notification whereby no additional questions are raised by the Dean of Graduate Studies; the offer letter is prepared by the Provost's Office
Provost's Office	Receive Recommendation Package	• Receive recommendation package • Prepare file for candidate • Proceed with existing Offer Letter Process
Activity	**Enter Search Summary Form Information in Mosaic**	
Faculty/ Department Administrator	Access Search Summary Form in Mosaic	• Log into Mosaic • Navigate to Self-ID Analysis Hub o Login to Mosaic/Manager Self-Service or Administrative Home/Click on 'Self-ID Analysis Hub Tile • Click on 'Search Summary Form' link to arrive at Search Summary Form screen • Click on 'Add a New Value' • At prompt, enter job opening id Result: The system will display a digitized version of the Search Summary Form Template Note: The Search Summary Form information is entered in Mosaic, after the recommendation package is sent to the Provost's Office/Faculty Relations Office (FHS)

Faculty/ Department Administrator	Enter Search Summary Form Information	• Populate the following information found on the completed search summary form:
		Position Information
		    o Position Title
		    o Position Number
		    o Faculty (name)
		    o Department (name)
		    o Department Chair (name)
		    o Option Committee Chair (name)
		        ▪ Only enter name if it is not the same as the Department Chair
		    o Candidate of Choice
		    o Starting Date
		
		Process Checklist – Items within each of the following categories:
		    o Preparation
		    o Recruitment
		    o Assessment
		    o Selection
		
		Dean's Approval
		
		• Add applicable attachments: Rubric Template and Completed Search Summary Form
		
		• Save Form
		Result: The data entered is saved within the system
		
		Note 1: There is the ability to return to the form if there is a need to view, edit (or complete) the form within Mosaic. Access is limited to the Job Opening ID's accessible for your specified Faculty.
		
		Note 2: Depending on Faculty, this activity may be performed by the Faculty Administrator (Dean's Office) or by the Department Administrator.
		
		Note 3: FHS is recommending that this activity is performed by the department Administrator's within each FHS Department

Report on Search Summary Form Information		
EE Team	Access Completed Search Summary Form Information within Mosaic	• Log into Mosaic • Navigate to Self-ID Analysis Hub o Login to Mosaic/Manager Self-Service or Administrative Home /Click on 'Self-ID Analysis Hub Tile o Click on 'Search Summary Form' link

		Result: Arrive at Search Summary Form Screen
EE Team	View/Edit Summary Form Information per Job Opening ID	• Prior to running reports, the EE team has the option to view and if needed (by request) edit data entered for a specific Job Opening ID • To view/edit search summary form information, on the Search Summary Form screen, enter the Job Opening ID • Click on 'Search' button Result: View Search Summary information entered for the Job Opening ID • View, Edit and Save any changes, if required • There is the ability to download any attachments associated with the Job Opening ID
EE Team	Run Report on Search Summary Data	• Within the Self-ID Analysis hub, navigate to the 'Search Form' Report link • The system provides the following options: o Ability to report on a specific Job Opening ID o Ability to report by Department Job Openings o Ability to report by Faculty Job Openings • To run the report, o Select report type o Enter the Job Opening ID, Department Name, Faculty Name, depending on the type of report you wish to run o Click on 'View Results' button Result: The system displays the following: Job Opening ID Report – the system displays the responses for each of the questions within the search summary form for a particular Job Opening ID Department/Faculty Report – the system displays aggregate counts of all questions within the search summary form by department/faculty, based on request
EE Team	Disseminate Report	• Compile query results • Transpose into Report template • Send to Provost's Office for Review 2 week's prior to scheduled SCA meeting • Provide to Senate by Committee 2 week's prior to scheduled SCA meeting • Reporting is required 6 months after Policy effective date, and annually, thereafter
Provost's Office	Receive Search Summary Report from EE Team	• Receive the Report • Review the Report, as an FYI

SCA	Receive Search Summary Report from EE Team	• Receive the Report • Include report as an agenda item for the next scheduled SCA meeting