A Researcher’s Guide to Hiring a Research Team

This document is meant to be a guide for York University researchers to aid them in hiring and paying personnel to support their research activities. This document will replace the document “A Researcher’s Guide to Employing Research Employees” issued on Feb 21, 2008. This document is a supplement to the Secretariat Policy of Employees Paid from Research Funds as well as the Secretariat Policy for Persons Paid from Research Grants and Contracts Held by York University Faculty Members.

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Introduction
This guide is intended to assist Researchers with the hiring and managing of a research team that is paid using grant or contract funds. This document is a supplement to the Secretariat Policies as well as Persons Paid from Research Grants and Contracts Held by York University Faculty Members (Procedure).

List of Contacts
Below is a list of representatives to contact if you have questions on the contents of this document.

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<th>Faculty/Department</th>
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Process Overview for Hiring a Research Team Member
Process Steps
1. Researcher identifies that they want to hire personnel for their research team.

2. Researcher reviews funding availability and determines the type of support (part-time, full-time, length of contract) required for the potential research team member (researcher should consult with local Faculty-based representative during this process – see list of Contacts referenced above).

3. The local Faculty-based representative works with Researcher to discuss the type of work/research the potential team member would be doing and determine the type of research personnel to hire.
4. The local Faculty-based representative works with Researcher to draft the job description and to determine an appropriate salary and if benefits are being offered.
   
a. Note: depending on the type of research personnel, salary and benefits may be dictated by the applicable collective agreement. Refer to the decision tree and subsequent descriptions to help determine the type of research personnel.

b. If the person to be hired is (or will be) a full-time graduate student, a unique set of determinations come into play, related to funding packages and the CUPE 3903 Collective Agreement. See sub-section on steps for graduate students and consult FGS.

5. If the potential team member is not a graduate student, the Researcher creates job posting using available templates and determines which avenues to use to post the job (see section on Job Posting for suggestions). Posting should be reviewed by the Faculty-based representative or Human Resources Business Partner (HRBP) before submitting. NOTE: Job posting may not be required if a suitable candidate is already identified. If the team member is a Graduate Assistant, a job posting is required and must follow the CUPE posting process in ARMS (Academic Resource Management System).

6. Researcher screens and interviews candidates, confirms eligibility to work in Canada or to enter Canada and drafts an offer letter or letter of invitation to the successful candidate using the appropriate template. Note: The template should not be altered other than highlighted areas, consult with VPRI HR if there are concerns with the template. If the position is for a Graduate Assistant, the offer letter should follow the CUPE process.

7. If the candidate requires immigration and relocation assistance, consult with your Faculty-based representative. This may require additional work to be done in conjunction with the Talent Acquisition and Development team (Immigration and Relocation Officer) or York International.

8. Once the candidate accepts the offer, the Researcher or research support personnel will complete an ETF and send it to Payroll for setting up in the system (Researchers should consult local Faculty-based representative to help with correctly filling out the form). NOTE: For Graduate Assistants, this is completed automatically through ARMS.

9. Once the newly hired research team member is set up in the payroll system, the Researcher will continue to manage and oversee onboarding, performance review, time tracking (if applicable) and ongoing work until contract is completed. See sections in this document on Onboarding and People Management for tools and templates to support your new research team member.

10. At the end of the contract, the Researcher or research support personnel should complete off-boarding of the research team member including completing an ETF and, IT, if applicable, and work with Faculty representative or VPRI HR to issue severance/vacation payout. Though not required, it is recommended to issue an end of contract letter (see templates section). Payroll will issue a Record of Employment (ROE), if applicable.
Determining the Type of Roles to Hire

Review Terms of Grant Funding
Consistent with the York University Procedure pertaining to Persons Paid from Research Grants and Contracts Held by York University Faculty Members (Procedure), faculty members should ensure that payments made to personnel in their research team comply with the terms of the grant or contract.

The Tri-Agency Guide on Financial Administration can be found here.

If you are unfamiliar with the terms of your grant or contract, contact Research Accounting at resacct@yorku.ca.
Decision Tree on Types of Research Personnel

Principal Investigator at YorkU hiring Research Staff using grant funds

Do you need admin support or will the person conduct research?

Admin

Research

Do you want to hire a YorkU student to conduct this admin work?

No

Yes

Do you require the candidate to have a PhD?

Yes

Undergrad

Grad Student

No

Graduate Student or Undergraduate Student?

Yes

Graduate Assistant (Member of CUPE 3903 – Unit 3)

Graduate Assistant (Member of YUFA)

Post-Doctoral Fellow

No

Post-Doctoral Visitor (Member of YUFA)

International Visiting Research Trainee (IVRT)

RAY program (or other Faculty based program)

Will you hire a YorkU student or a student from an international university?

YorkU

International

Graduate Student or Undergraduate Student?

Yes

Research Associate

Research Assistant

Undergraduate Work Study Program

No

Post-Doctoral Fellow

Note: If you are using operational funds, some of these options may not apply. Speak with your HRBP or FRA for more information.
Definitions of Types of Research Personnel and Who to Contact

Graduate Students

Graduate Student Research Assistant

- The Graduate Student Research Assistants (RA) are Master’s and PhD students at York University. Note: This is a different category from research assistants which are not York University students (research support assistants). York University students cannot be hired as research support assistants (RSA).
- The activities comprising the role as a research assistant (RA) must be for the purpose of advancing the student’s progress towards their program and degree requirements, i.e., they must be participating in research that is relevant and related to their own research topic (Note: If the student is NOT making progress in their own research, they would not be an RA, they would be hired as a Graduate Assistant – see below).
- NOTE: Full time registered Active Graduate students can only receive a Research Assistant position under this category.
- This role does NOT qualify the student as an employee of York University (Note: Student could hold a separate role/contract that qualifies them as an employee, i.e., a Graduate Assistantship).
- There is no set number of hours and no hourly rate, students are offered a stipend which is divided by the number of months in the contract for the monthly pay rate. Note: RA stipends are non-taxable income for full-time students, and they are not eligible for vacation pay.
- The student does not receive benefits through this research assistant position; however, they are covered under York University Graduate Students’ Association (YUGSA) healthcare plan due to their student affiliation.
- See here for more details on grad student definitions.
- Contact the student’s Graduate Program Director, Graduate Program Assistant or the Faculty of Graduate Studies for more information.

Graduate Assistants

- Graduate Assistants (GA) are graduate students at York University.
- They are completing work that can be administrative/clerical in nature OR can be research but does NOT overlap with their own research and field of study (i.e., the work is NOT for the purpose of advancing the student’s progress towards their program and degree requirements).
- These students ARE considered York University Employees and are members of CUPE 3903-Unit 3.
- Job postings to hire Graduate Assistants must follow the CUPE posting process in ARMS.
- These positions have a restriction of maximum 135 hours per term (e.g., maximum 10 hours per week). Note: All full-time graduate students are limited to 10 hours of work per week, per FGS guidelines.
- GA assignments must be hired for a 4-month period/one term (135 hours/0.5 GA) OR for two terms (270 hours/1.0 full GA).
- Salary/rates of pay are as per the collective agreement (CUPE 3903-Unit 3).
- GAs are eligible for benefits as set by the collective agreement (CUPE 3903-Unit 3) and benefit rates are set annually.
Undergraduate Students

RAY (Research at York)

- RAY positions support the research culture of the University and the undergraduate student academic experience by providing paid opportunities for eligible and qualified undergraduate students to participate in research projects with faculty members and fellow students. RAY positions involve undergraduate students in quality research activities that will provide them with hands-on research experience, and at the same time will provide the faculty member with meaningful research support.
- RAY students are undergraduate students participating in research related to their field of study.
- This can be coordinated through the York University RAY program or through a Faculty based undergraduate research program.
- Contact the work study team OR your Faculty Research Director/ADR for more information, or log into the intranet for details on posting, hiring and paying undergraduate students.

Work Study Student

- The Work Study Program provides students with a broad range of opportunities to contribute in support roles while developing valuable, relevant skills and work experience for the workplace.
- Work Study students are full-time undergraduate students participating in non-research work (administrative/clerical) on a part-time basis.
- Work study students (paid) are employees of York University.
- Contact the work study team for more information, or log into the intranet for details on posting, hiring and paying undergraduate students.

Post Docs

Postdoctoral Visitors

- Employees whose sole source of funding is administered by York University (e.g., through grant funds provided by a York University Faculty Member). Note: Post-Doctoral Visitors cannot hold their own external funding, see Post-Doctoral Fellows below.
- Members of YUFA.
- Must be appointed through Faculty Dean’s office.
- Salary and benefits set by the collective agreement.
- 3 weeks’ vacation.
- Teaching: allowed up to 1.0 full course equivalent (FCE).
- Salary is paid by a faculty member’s research grants (typically), and any teaching is paid by the hiring unit.
- Contact the Post-Doc Coordinator for more information.
• Review the Postdoctoral Handbook.

Postdoctoral Fellows

• Not considered employees of York University.
• Holds their own external funding offered by agencies and/or non-York sources and typically apply for such fellowships in their own name. (Note: Post-Doctoral Fellows may receive additional ‘top-up’ funding from faculty member grants).
  o Note: PDFs can have their external funding/fellowship administered at York (e.g., CIHR, Mitacs, Elevate, Banting) or have their fellowship administered outside of York (e.g., SSHRC, NSERC). Depending on the fellowship type there can be slight differences. See here for more details.
• Salary, benefits, and vacation are not provided by York University as they are not considered employees or students of York University. However, if they do have ‘top-up’ funding from faculty member grants, the supervising faculty member can provide a benefits package (see sections below on benefits).
• No teaching entitlement: however, they can apply for CUPE 3903-Unit 2 contracts, e.g., Course Directorship or TA. Note: CUPE Exemptions are possible.
• Note: Limited access to York services due to absence of employee or student number (can receive guest Passport York accounts and guest YU Card. Library issues a piece of paper they can use as identification for taking out books – see onboarding).
• Contact the Post-Doc Coordinator for more information.
• Review the Postdoctoral Handbook.

Non-Student

Research Support Assistants

• This term refers to individuals who are NOT full time York University students who can be doing research or administrative/clerical work without a PhD or other advanced degree. Note: York University students can NOT be hired as research support assistants (RSA).
• Can be hired independently by the PI and are considered employees of the grant, NOT employees of York University.
• Working hours as well as hourly rate/annual salary and benefits can be negotiated and are set by initial contract; however, generally range from $35,000-$60,000 annually.
• Research Assistants can be full-time or part-time personnel. Part-time personnel are offered a contract on an hourly basis with the following potential agreements:
  o That the employment will not exceed the equivalent of 3 continuous months of full-time work (i.e., cannot work 35 hours a week for more than 3 consecutive months);
  o OR that the employment be a limited term (which may be greater than 3 months) but for fewer than 24 hours per week. Note: Those working less than 24 hours of work per week are not eligible for benefits.
• Contact your local research support personnel or VPRI HR for more information.
Research Associates

- This term refers to individuals with advanced training (usually a PhD or a terminal or equivalent degree in the field in which the research is to be carried out).
- They are usually actively engaged in research and may be credited in the dissemination of research results; however, they may also participate in administrative/project management duties.
- They can be hired independently by the PI and are considered employees of the grant, NOT employees of York University or Post-Docs
- Working hours as well as hourly rate/annual salary and benefits can be negotiated and are set by initial contract, however, usually range between $35,000-$80,000 annually.
- Note: Those working less than 24 hours of work per week are not eligible for benefits.
- Note: Limited access to York services due to absence of employee or student number (can be hired independently by the PI)
- Contact your local research support personnel or VPRI HR for more information.

Non-Resident/International Staff

International Visiting Research Trainee (IVRT)

- Registered full-time students in a degree program at an institution outside of Canada.
- Visiting York for a limited time period, usually between one and twelve months and spending this period of time performing research under the guidance of a York University hosting Faculty member.
- Not registered or registering in courses or enrolled in a program for credit at York University nor pursuing a joint or dual degree in which one of the partners is York University.
- For more information, see here.
- Contact York International’s Immigration Specialist at iadvisor@yorku.ca for more information.

International Post Doc

- Contact Post-Doc Coordinator for more information on process.
- Faculty Deans’ Offices and local research support personnel can also assist and provide more information on the process.

International Research Assistant or Associate

- Immigration/work authorization will not be required for an International Research Assistant or Associate who will be working from outside of Canada (remotely). If the International Research Assistant or Associate will be entering Canada for less than 120 days, they are exempt from obtaining a work permit. Please refer to the following link for further information.
- When an international candidate (more than 120 days) is desired, and a Labour Market Impact Assessment (LMIA) exemption cannot be applied, a full job posting, interviewing, hiring, and LMIA process must be conducted. This can take up to 1 year and is required by Canadian Immigration regulations.
- Please contact Sajia Sadeque, Immigration & Relocation Officer, at ssadeque@yorku.ca, if you require assistance.
International York University Student – Graduate and Undergraduate

- York University international students must have a valid study permit with work authorization comments printed on the study permit to be eligible to work. They must also hold a valid social insurance number and be registered as a full-time student.
- Work authorization for undergraduate students and graduate students is limited to 20 hours off campus during regular academic sessions (e.g., Fall and Winter for most undergraduate programs) or else full-time hours during scheduled breaks (like summer), so long as the student was registered as full-time before the break and is returning to full-time studies after the break. For programs with no scheduled breaks, off-campus work authorization is limited to 20 hours throughout the period of study. There is no upper limit to on campus work authorization.
- Information on Work/Study eligibility for international students can be found here.
- Note: If the student is not in Canada, whether or not they can be hired by York depends on a few different factors and in this case, please contact York International’s immigration specialist at iadvisor@yorku.ca.
- Depending on the question, you may contact the work study team, the Faculty of Graduate Studies, or York International’s immigration specialist at iadvisor@yorku.ca.

Visiting Professors/Scholars
If you are interested in having a visiting professor/scholar brought to York University to work with you, please contact your Faculty Dean or Department/School Chair.

Non-Personnel – Consultants and Independent Contractors

- By definition, a consultant is a person or entity that under an agreement, other than an employment agreement, provides expert or strategic advice and related services for consideration and decision-making.
  - NOTE: It is rare that a researcher would need to hire a consultant
  - If the person is a consultant, follow Procurement Processes.
- A contractor is a person or entity retained under a fee-for-service arrangement, that is not an employment agreement, to perform specific tasks under a clients’ direction for a limited period of time.
  - If you believe you will be hiring an independent contractor and not staff, complete the Independent Contractor Questionnaire from Central Finance to determine eligibility, and contact General Accounting.
  - You can also see the Guideline for Employees vs. Contractors. If the person is an independent contractor or consultant, follow Procurement Processes.
Finding the Right Candidate

Note that the options for finding the right candidate vary depending on the type of team member you are hiring.

- Graduate student hires: Contact FGS for details.
- Undergraduate student hire: See here.
- Post Doc hires: See here.

The below outlines general steps that can be taken, but specific considerations will need to be taken for the type of hire. Contact your Faculty-based representative or VPRI HR for more information.

Planning for a Hire

*See Manager Resources on York University for full details, below is an excerpt:*

Planning is the foundational step in acquiring the right talent. Having the right people in your team makes your research group efficient and productive. You want to have people that are effective at doing their jobs and who can achieve their targets, while also being the right fit for your research needs.

You can work with your Faculty Representative as well as VPRI HR as early as the grant writing stage to start planning for the right hire in terms of budgeting/funding options and determining skills requirements. See the following tools:

- 2020-2021 Research Costs Table
- Research Salaries Cost Estimator

Consider potential conflict of interest when hiring. See the York University Conflict of Interest Policy for Employees (Policy and Guidelines).

Defined-Term / Task Employment Contract

Typically, research personnel are hired for a specific term or task. This is usually due to the uncertainty of research funding and inability for the grant holder to make long-term employment commitments. For this reason, it is recommended to limit any contractual agreements to 12 months. If the source of research funding permits, a contractual appointment can be established for up to 24 months.

**NOTE:** There may be a liability for termination/severance payments if there are successive contracts totalling over 5 years, in accordance with the Ontario Employment Standards Act (ESA). If applicable, severance payments and/or accrued vacation credits may need to be paid out. These successive contracts can be from more than one researcher. For more information contact VPRI HR.

Job Description

*What to include in a job description:*

The job description should include the following:

- Job/Position Title
- Name of Research Group/Department for the role (optional to include the logo for the Research Group)
- Position/Contract Type and Duration
- Hours of Work
- Salary Range
- Context/Background/Job Purpose
- Job Description/Duties
- Outline any safety sensitive areas of work (e.g., use of hazardous materials)
- Qualifications
  - Education
  - Experience
  - Competency/Skills
  - Certifications

For Post Doc templates see [here](#).

**Considerations for Job Descriptions**

- Give a definition of the competency/skill requirements rather than only listing tasks.
- Outline education, experience and skills requirements ensuring that they relate to the job responsibilities.
- Ensure that you account for statutory benefits, if applicable. This varies depending on the type of role you are hiring: See [Research Salaries Cost Estimator](#) and [2020-2021 Research Costs Table](#)
- If the team member will be performing a safety sensitive role, ensure they have the correct qualifications/certifications.
- Include language in the job description around accommodation and equity, diversity and inclusion (see example above).
- Contact VPRI HR for review/suggestions/consultations.

**Job Posting**

The job posting is a modified version of the job description that is used to advertise the position when attempting to recruit the right candidate. It is important to include additional information such as the start/end dates of the contract, closing date for applications, standard language for accommodation and equity, diversity and inclusion and the Vaccine Mandate.

**Standard language for accommodation and equity, diversity and inclusion:**

- The XX project welcomes applications from all qualified individuals, including, but not limited to women, persons with disabilities, visible minorities (racialized), Indigenous Peoples and persons of any gender identity and sexual orientation. We are committed to a positive, supportive and inclusive environment.

  The XX project offers accommodation for applicants with disabilities in its recruitment processes. If you are contacted by us regarding a job opportunity or testing, please advise if you require accommodation.

**Standard language for Vaccine Mandate:**

- York University requires all persons, including employees and visitors who attend our campuses be fully vaccinated against COVID-19, subject to medical and human rights exemptions, in accordance with all applicable laws and regulations. The University's vaccine policy is integral to our ongoing commitment to health and safety.
Summarize the key points of the job description and make sure to include the contact information for who will review the applications (usually the PI). If applicable, you can insert your research team logo on the job posting.

There are multiple options for posting (Note: The type of role that is being hired will determine where the job can be posted. Student roles should be posted internally to York University):

- For non-student positions:
  - There are options to post on the York Research website and the Other Job Opportunities page under York Careers. Faculties and departments may have their own job sites as well.
    - [https://research.info.yorku.ca/research-jobs/](https://research.info.yorku.ca/research-jobs/)
    - [https://hr.info.yorku.ca/viewopportunities/other-job-opportunities/](https://hr.info.yorku.ca/viewopportunities/other-job-opportunities/)
  - LinkedIn is a recommended option.
    - Note: LinkedIn has a cost to post. Work with VPRI HR to determine the best approach.
  - Charity Village is another recommended option.
    - Note: Charity Village has a fee to post. Work with VPRI HR to determine the best approach.
  - Review niche websites related to your area of research.
  - Send out through relevant networks/listservs, share on your social networks, etc.
- For undergraduate student postings see here.
- For graduate student postings, contact the relevant Graduate Program Director (GPD) or Graduate Program Assistant (GPA) for more information.
  - For Graduate Student Research Assistants, work with the GPD to help match to a graduate student.
  - For Graduate Assistants, work with the GPA or your research administrator to help you post your job posting through ARMS. Note that Graduate Assistants are members of CUPE 3903 and job postings should align with CUPE guidelines.
- For post-docs see here.
  - PDFs can follow a similar process to non-students.
  - PDVs have the option to post through the academic postings page.
  - Contact local research support in your Dean’s Office for more information.

Contact your Faculty-based representative or VPRI HR for further guidance when preparing your posting.

**Interview**

*See Manager Resources on York University for full details, below is an excerpt:*

Now that you have considered, planned and documented your hire process, it is time for action.

Selecting qualified applicants is a critical step in building a talented and committed workforce, supporting an effective organizational culture, and enhancing the overall performance of your research.

**You are encouraged to reach out to your Faculty representative or VPRI HR** to see how we can help to support you during the assessment and selection phase. We can partner with you to assist with the creation of a recruitment plan/strategy, interview structure/questions, job skills testing and related assessments, participating on interview panels and overall best practice advice and support.
If you are hiring a Graduate Assistant, please following the guidance in the CUPE 3903 Collective Agreement [here](#).

Please keep the following in mind when planning the assessment and selection process:

- Screen/shortlist applicants against your education, experience, and skills requirements.
- Develop relevant interview questions (see [Interview Question Guide](#)), you can also reach out to your Faculty representative or VPRI HR for example questions.
- Your interview panel should consist of a minimum of two (2) people (the PI and another relevant stakeholder, as well as an HR rep if possible), follow a consistent interview format, and use consistent interview questions for all candidates.
- Consider potential accommodations that you may need to make for interviews.
- Interviews should be conducted in a fair, consistent and reasonable manner.
- For administrative positions, if a test is administered as part of the selection process, the test shall be relevant to the position and should be reliable and valid. (Note that testing cannot occur for a Graduate Assistant role and typically does not happen for a graduate student RA role)
- It is highly recommended that you develop a comprehensive scoring and rating system that weighs each job requirement by importance. (Note: Again, if hiring within a collective agreement follow the directions of the agreement)
- We must adhere to the Ontario Human Rights Commission in all hiring and managing of staff to ensure an inclusive, harassment-free and positive environment for all. For guidelines regarding permissible and prohibited interview questions and practices, read the [Ontario Human Rights Commission](https://www.ohrc.on.ca) publication on Human Rights at Work.

**Recruitment Checks**

*See Manager Resources on York University for full details, below is an excerpt:*

The following 4 recruitment checks can be conducted for job postings (Note: not all role types will require reference checks, review the terms of the respective collective agreement for the role you are hiring, if applicable):

- References
- Education, Professional Designation, Certification, Memberships & Licences
- Driver's Licence Information and Driver's Abstract (only required if driving is a requirement for the job)
- Vulnerable Sector

Recruitment Checks are an important part of the selection process as they:

- Contribute to your decision-making process in assessing the right candidate for the job;
- Verify candidates have the qualifications and skills required for the position;
- Ensure consistency and compliance with collective agreements and legislative requirements (e.g., Human Rights Act); and
- Address the risk management issues on behalf of the University and meet requirements of York's Insurers.
Timing varies depending on the check. Requests for education verification and designations should be brought to the interview. Requests for references should happen with your top candidate and Vulnerable Sector Check and Driver's Abstract/Licence requests are post offer.

See link to templates for reference checks: Reference Check Templates

Offer Letters
Offer Letters should contain the following information:

- Terms of Contract (as specified in the job description or per negotiation)
- Position and Responsibilities
- Reporting relationship
- Salary
- Use the Research Salaries Cost Estimator and 2020-2021 Research Costs Table to help determine salary costs and statutory benefits (EI, CPP, etc.)
- Benefits (if, applicable)
- Public Holiday Pay, Leave and Discretionary Days
  - Personnel are eligible as per the Ontario Employment Standards Act, 2000
- Overtime and Vacation
  - Staff are eligible as per the Ontario Employment Standards Act, 2000
- Note on Policies and Procedures
- Note on Performance Reviews
- Conditions for Termination of Appointment
- Conditions for Renewal or Extension of the Contract

Note: For hiring graduate students, work with Faculty of Grad Studies on drafting the offer letter.

Note: If the candidate is international, at letter of invitation is issued, not an offer letter. Work with York International to support the immigration and relocation process, or Post-Doc Coordinator for international Post-Docs.

See templates for Post-Docs here.

Salary, Pension and Benefits
If the role you are hiring is a part of a collective agreement, please contact the research HR support in your Faculty when determining salary, pension and benefits. Otherwise, salary and benefits may be negotiated between the researcher and the potential research team member.

Note: Depending on the type of role being hired they may be eligible for the York University Pension Plan if they are considered employees of York University. Confirm with your Faculty representative or VPRI HR.

Similarly, for vacation, refer to the respective collective agreement if applicable. Otherwise, vacation time can also be negotiated as credits or paid in lieu. Ensure to document accordingly.

If hiring multiple team members, be sure to review for equity and consistency across your team.
Review the ‘Considerations for EDI’ section of this document when finalizing your offer letter.

Cost of Benefits
Benefit costs vary depending on the affiliation and the hours worked. If applicable, review the respective collective agreement for the role you are hiring. It is imperative the correct letter of offer is used when hiring an employee to ensure the correct benefits are provided. Benefits can include: health, vision, dental, group life insurance, long term disability and pension. The affiliation and hours of work determine what benefits, if any, are provided.

Pension plan eligibility may be addressed in the letter of offer, during orientation or by a letter sent to the employee from the Pension & Benefits office.

When salary is charged to a 400 or 500 cost centre, then the premium costs per benefit and actual total pension plan costs are charged. Refer to the Employee Benefit Rate Chart for premium costs.

Roles and Responsibilities
• Management Supervisor, Dean/Principal/University Librarian or Designate:
  o Provide the appropriate letter of offer when hiring a new employee.

• Payroll:
  o Deducts taxes/premiums/contributions as required.

• Pension and Benefits:
  o Will update the relevant system by the end of the week the completed documents received.

Considerations for Equity, Diversity and Inclusion (EDI)

“The goal of employment equity is to eliminate gaps in representation of the designated groups, and to remove barriers in the employment life cycle which may be preventing designated groups from being hired in and/or retaining certain positions. York is dedicated to EDI; this has been built into its guiding strategic documents and its organizational structure. It is part of our vision and mission statements and is publicly stated in several of the University’s key strategic documents, including our University Academic Plan, Provostial White Paper, and Strategic Priorities.”

“EDI is supported through its policies for faculty and staff such as using a name other than their legal name to represent themselves at York for reasons of gender identity and gender expression and eight weeks of paid leave for Transsexual Transition. As well, York offers flexible work hours to accommodate employees who need time off for religious observance and offers accommodations due to a new disability.”

The Employment Equity Officer can be reached via email at equity@yorku.ca, or by phone at 416-736-2100 x22771.

Below are links to relevant York University policies on Equity, Diversity and Inclusion, these can be considered as guidelines when hiring and managing your research staff:

• Employment Equity Policy
• Workplace Harassment Prevention Policy
• Workplace Violence Prevention Policy
• Healthy Workplace Policy

Below are links to nonYork University resources to consider when hiring:

• Federal Contractors Program
• Ontario Human Rights Code

The Fair Hiring Practices Quick Tip Sheet, summarizes considerations for fair hiring practices.
Onboarding and People Management

Onboarding

See Manager Resources on yulink for full details, below is an excerpt:

Onboarding your new employee is important so they:

- Feel welcomed;
- Experience a smooth transition and are effectively integrated into your team;
- Feel good about their decision in choosing to work in your research group; and
- Are successful in their new role.

Onboarding is a process that begins before a new employee starts and typically continues until at least the first three months. Its purpose is to orient the new employee to the policies, procedures, culture, expectations and the day-to-day responsibilities within the research group.

Checklist for Onboarding

Some things that you may want to consider when onboarding a new research team member include:

- Working with HR and IT to get them an employee number, email and office extension phone number, if applicable.
- Completing an ETF and submitting to Payroll to ensure personnel member is paid on time.
- Announce the team member's arrival to the team, see New Team Member Email Template.
- Get workstation set up and follow ergonomics procedures as required.
- Provide the team member with appropriate office supplies and materials.
- If possible, have a peer mentor who will show the staff through the day-to-day tasks.
- Give a list of key contacts and set meetings with relevant stakeholders.
- Add staff member to relevant listservs.
- Review the job duties and standard of performance.
- Review the office/unit policies.
- Review safety procedures.
- Enroll staff in relevant trainings.
- Review absence/vacation reporting procedures.
- Schedule ongoing check-ins to make sure the new staff members is adjusting to the work environment
- Note for Post Docs, see the incoming checklist here.

Time Tracking

For research team members that are paid on an hourly basis, they will need to complete timesheets on a bi-weekly basis. This should be signed by the research and submitted to Payroll at hrhelp@yorku.ca.

Training

Research team members should comply with specific training when working in Ontario and on York University Campus.
- Accessibility for Ontarians with Disabilities Act (AODA)
  - https://www.aoda.ca/free-online-training/
- Health and Safety Awareness training
- WHMIS
  - http://whmis.org/jurisdictions/on.html
  - https://www.ccohs.ca/oshanswers/chemicals/whmis_ghs/education_training.html
  - Options for WHMIS training
    - https://onlinewhmis.ca/whmis-training/
    - https://www.whsc.on.ca/Training/Training-Registration/WHMIS-training
- Diversity & Inclusion, Violence and Harassment
  - https://rights.info.yorku.ca/online-harassment-guide-for-faculty-and-staff/

Safety, Risk Assessments and Working Off Campus
Researchers need to consider the health and safety of their research team members as they work. The above section shows the minimum recommended training; however, researchers should also consider other training based on the nature of their work and ensure that the team member has the correct safety qualifications/training to conduct work safely.

Ergonomics
- Ergonomic assessments are not covered for research personnel but Ergonomics Self Help is available.
- There is also a free course online by Public Services Health and Safety Association.

Institute for Work and Health, free e-learning
- Research team members have access to EFAP services if they are employees of York University.

Workplace Safety and Insurance Board
- York University has a duty of care for all staff, students and visitors on the campus. If there is a workplace incident involving a research team member while working on campus, contact HSEWB for more information. If your personnel is considered a York University employee, then follow the Incident Reporting and Investigation program as outlined on the Reporting Health and Safety Website.
- For non-York University employee research personnel, please complete an incident report as per the SOP for Incident Reporting.
- Note, when hiring graduate students they must also complete the Graduate Risk Assessment Checklist.

Contact the Risk Management Team for more information on insurance or HSEWB for more information regarding health and safety (HSEWB@yorku.ca) or WSIB coverage (EWB@yorku.ca).

Performance Management
See Manager Resources on York University for full details, below is an excerpt:
Establishing and Communicating Performance Expectations

Managers have the right to direct and assign work as required and determine standards of performance. Standards of performance should be clearly communicated to employees. The communication should be documented to demonstrate that the communication occurred.

Setting Expectations

While the duties and responsibilities of a position are found in the Job Summary, the performance expectations are not. The manner in which the work is to be done, including the quantity and quality should be provided through a Standing Operating Procedure (SOP) and/or some other documented mechanism.

Structuring Expectations

Expectations may and should be structured to meet the needs of employees who are new to a position or job requirement. Expectations may evolve as the employee moves from novice to an experienced practitioner.

Should the employee not meet the standard expectation, documentation is necessary in order to take corrective action.

Timing

Expectations must be communicated whenever they are changed. It is a best practice to confirm whether the employee has read any new or revised expectation (SOPs or project specific instruction) on a regular basis.

Payroll

Research personnel should be paid as per the contractual agreement. If hiring a grad student or post doc, work with Faculty of Graduate Studies to ensure the correct method of payment.

Determine if payment will be monthly or bi-weekly and communicate to the research team member. Monthly payroll is typically for personnel with a set number of hours of work per week, whereas biweekly payroll is for personnel with variable hours of work and timesheets must be submitted to Payroll on a biweekly basis in order to initiate payment.

Use the ETF template to ensure that employees are paid via Payroll from your research cost centre. Review the form with your Faculty representative prior to submission to ensure accuracy and timeliness of employee payment.

Contract extension

If a researcher wishes to extend the contact of a research staff, a document must be signed as a formal agreement of the extension and a corresponding ETF submitted to HR for processing.

See template here: RA Extension Letter

Overtime / Holiday / Vacation

If the team member you are hiring is a part of a collective agreement, refer to the terms of the collective agreement. For graduate student RAs, overtime/holiday and vacation are not eligible. For all other research staff, they are eligible for overtime holiday and vacation in accordance with relevant provisions of the Ontario Employment Standards Act, 2000.
Leave of Absence

Research personnel shall be eligible for leaves in accordance with relevant provisions of the *Ontario Employment Standards Act, 2000* and with the terms of their respective collective agreement. Note: please refer to the terms of your grant agreement as you may be eligible for funds to cover the costs of leave.

Duty to Accommodate

Researchers should consider their duty to accommodate with respect to EDI and the Human Rights Code. Please review the documentation from the Canadian Human Rights Commission [here](#).
Offboarding

Best Practices

- Notice of Contract End – It is recommended that letters be sent when contracts are ending to provide proper notification. Work with your Faculty representative or VPRI HR to ensure that the letter is drafted with the correct information from the original contract.

- Timings - Give consideration to contract end dates and/or termination as well as proximity to holidays etc. Below is a guideline for notice requirements:

<table>
<thead>
<tr>
<th>Length of Employment</th>
<th>Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 3 months</td>
<td>No notice required</td>
</tr>
<tr>
<td>3 months to 1 year</td>
<td>1 week</td>
</tr>
<tr>
<td>1 year to 3 years</td>
<td>2 weeks</td>
</tr>
<tr>
<td>3 years to 4 years</td>
<td>3 weeks</td>
</tr>
<tr>
<td>4 years to 5 years</td>
<td>4 weeks</td>
</tr>
<tr>
<td>5 years to 6 years</td>
<td>5 weeks</td>
</tr>
<tr>
<td>6 years to 7 years</td>
<td>6 weeks</td>
</tr>
<tr>
<td>7 years to 8 years</td>
<td>7 weeks</td>
</tr>
<tr>
<td>8 years or more</td>
<td>8 weeks</td>
</tr>
</tbody>
</table>

- Termination procedures
  - If you are terminating a contract before the original end date, discuss with your Faculty representative or VPRI HR for support in drafting a termination letter. Book a private room for the discussion with the team member and if possible, try to have security present.

- Talk to VPRI HR for best practices.

Record of Employment

Work with Payroll to ensure a ROE is completed and issued to the staff member.

Termination Pay

Depending on the type of role, research team members may be eligible for statutory termination pay as per the *Ontario Employment Standards Act, 2000* or collective agreement. Review the terms of your grant, as some grants have eligibility for severance. Consult with VPRI HR or local research support and HR personnel, if you are terminating a contract prior to its end date, or if otherwise not continuing to employ a team member after 5 years of employment with a York University researcher.

Contact

For more information or questions on the content of this document, please contact VPRI HR at rihelp@yorku.ca.
Appendix

List of Templates

- ETF
- Independent Contractor Questionnaire
- Research Salaries Cost Estimator
- Interview Question Guide
- Reference Check Templates
- Employee Benefit Rate Chart
- Fair Hiring Practices Quick Tip Sheet
- New Team Member Email Template
- RA Extension Letter
- Planning for Hires Checklist
- Onboarding Checklist
- Offboarding Letter Template (Employee Exit Protocol Checklist)
- 2020-2021 Research Costs Table
- Biweekly Timesheet
- Note: All templates related to Graduate Student research staff should be obtained from the Faculty of Graduate Studies
- For Templates related to Post Docs see here or log in through PPY here

List of Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Acronym/Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRBP</td>
<td>Human Resources Business Partner</td>
</tr>
<tr>
<td>ETF</td>
<td>Employee Transaction Form</td>
</tr>
<tr>
<td>GPD</td>
<td>Graduate Program Director</td>
</tr>
<tr>
<td>GPA</td>
<td>Graduate Program Assistant</td>
</tr>
<tr>
<td>PDF</td>
<td>Post-Doctoral Fellow</td>
</tr>
<tr>
<td>PDV</td>
<td>Post-Doctoral Visitor</td>
</tr>
<tr>
<td>PPY</td>
<td>Passport York</td>
</tr>
<tr>
<td>VPRI</td>
<td>Vice-President Research &amp; Innovation</td>
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</tbody>
</table>