

HEC MONTRÉAL

EQUITY, DIVERSITY AND INCLUSION: KEYS TO EXCELLENCE IN RESEARCH

ACTION PLAN
FOR EQUITY, DIVERSITY
AND INCLUSION
IN RESEARCH
2018 Version

2017-2019

TABLE OF CONTENTS

1. DEFINITIONS	3	APPENDIX A	
1.1 DESIGNATED GROUPS	3	COMPOSITION OF THE SUPERVISORY COMMITTEE	18
1.2 INDIGENOUS PEOPLES	3	APPENDIX B	
1.3 PERSONS WITH DISABILITIES	3	EXTRACTS FROM THE POLICY ON THE	
1.4 MEMBERS OF VISIBLE MINORITIES	3	MANAGEMENT OF CHAIRS	19
1.5 EQUITY	3	APPENDIX C	
1.6 DIVERSITY	3	CRITERIA FOR ASSESSING CANDIDATES	21
1.7 INCLUSION	3	APPENDIX D	
2. MESSAGE FROM THE DIRECTOR OF HEC MONTRÉAL	4	EXAMPLE OF INTERNAL JOB POSTING	22
3. KEYS TO EXCELLENCE	5	APPENDIX E	
3.1 MAINTAINING OUR COMMITMENT	5	EXAMPLE OF EXTERNAL JOB POSTING	23
3.2 A BOLD ACTION PLAN	5	APPENDIX F	
4. ABOUT HEC MONTRÉAL	6	EXTRACT FROM THE REGULATIONS ON SABBATICALS,	
4.1 RENOWNED BUSINESS SCHOOL	6	LEAVES AND SCHOLARSHIPS FOR CURRENT	
4.2 FACTS AND FIGURES	6	AND FUTURE PROFESSORS	28
5. STATE OF AFFAIRS	7	APPENDIX G	
5.1 CURRENT PROFILE	7	EXTRACT FROM THE REGULATIONS ON	
5.1.1 Canada Research Chairs	7	APPOINTMENTS AND PROMOTIONS OF PROFESSORS	28
5.1.2 Governance	8	APPENDIX H	
5.2 PROGRESS	8	EXTRACT FROM THE RESEARCH AND KNOWLEDGE	
5.2.1 Recruitment of Professors	8	TRANSFER STRATEGIC PLAN	29
5.2.2 Recruitment and Selection of		APPENDIX I	
Research Chairholders	8	EXTRACT FROM THE POLICY ON FACULTY ACTIVITIES	30
5.2.3 Assessment, Renewal and Elimination of		APPENDIX J	
Research Chairs	9	TRAINING ON UNCONSCIOUS BIAS	30
5.2.4 Canada Research Chairs	9		
5.2.5 Existing Policies and Regulations	9		
5.2.6 Framework for Research Chairholders	9		
5.2.7 Pay Equity	10		
5.3 CHALLENGES	11		
5.3.1 Attracting Researchers	11		
5.3.2 Retaining Researchers	11		
5.4 OPPORTUNITIES	11		
6. ACTION PLAN	12		
6.1 VISION	12		
6.2 PRIORITIES ANCHORED IN HEC MONTRÉAL'S			
VALUES	12		
6.3 OBJECTIVES	12		
6.4 STRATEGIES AND ACTIONS	13		
7. IMPLEMENTATION AND FOLLOW-UP	17		

1. DEFINITIONS

1.1 DESIGNATED GROUPS

Designated groups are women, Indigenous peoples, persons with disabilities, and members of visible minorities¹.

1.2 INDIGENOUS PEOPLES

Persons who are First Nations, Inuit and Métis, in accordance with federal and provincial statutes^{2, 3}.

1.3 PERSONS WITH DISABILITIES

According to the Employment Equity Act of the Government of Canada, persons with disabilities means persons who have a long-term or recurring physical, mental, sensory, psychiatric or learning impairment and who:

- a) consider themselves to be disadvantaged in employment by reason of that impairment, or
 - b) believe that an employer or potential employer is likely to consider them to be disadvantaged in employment by reason of that impairment,
- and includes persons whose functional limitations owing to their impairment have been accommodated in their current job or workplace².

According to the Equal Access Employment Program in the Act respecting equal access to employment in public bodies of the Government of Quebec, a person with disabilities refers to all persons living with a disability resulting in significant and persistent incapacitation and who is liable to encounter obstacles in the performance of everyday activities³.

1.4 MEMBERS OF VISIBLE MINORITIES

Visible minorities are persons, other than Indigenous peoples, who are non-Caucasian in race or non-white in colour⁴. For information purposes: They include Chinese, South Asian, Black, Filipino, Latin American, Southeast Asian, Arab, West Asian, Japanese, Korean, other visible minorities and multiple visible minorities⁵.

1.5 EQUITY

Equity guarantees fair treatment and equal access to employment or career advancement opportunities. The concept also refers to the efforts made by HEC Montréal to identify and eliminate potential barriers that prevent designated groups from fully participating in academic life.

1.6 DIVERSITY

Diversity refers to the plurality of personal and professional experiences, as well as differences between cultures. The concept reflects the differences in race, colour, place of origin, religion, immigration status, Indigenous status, ethnicity, abilities, gender, sexual orientation, gender identity and age.

1.7 INCLUSION

Inclusion is the action of creating and nurturing environments where each individual or group of individuals feels welcomed and respected in their differences, so that all people can participate fully in academic and research activities at HEC Montréal.

1. According to the Secretariat of the Canada Research Chairs Program

2. Employment Equity Act of the Government of Canada

3. Equal Access Employment Program in the Act respecting equal access to employment in public bodies of the Government of Quebec

4. According to the Secretariat of the Canada Research Chairs Program

5. <https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4068739-eng.htm>

2. MESSAGE FROM THE DIRECTOR OF HEC MONTRÉAL

HEC Montréal believes that diversity is a source of wealth that should not be the subject of any compromise. This is why the School fully adheres to the principles of equity, diversity and inclusion. Its commitment is clear: all qualified candidates have an equal opportunity to hold a Canada Research Chair, regardless of their gender, race, disability or ancestry.

Therefore, this action plan serves as a benchmark for all the efforts made by HEC Montréal to honour this commitment.

Michel Patry,

Director

3. KEYS TO EXCELLENCE

3.1 MAINTAINING OUR COMMITMENT

The Canada Research Chairs Program (CRCP) encourages the recruitment and retention of ambitious researchers pursuing promising research programs. As of May 2017, the CRCP had 1615 Chairs in over 75 Canadian post-secondary institutions. Of these, only 30 % of the chairholders were women. In the case of Tier 1 chairholders, the number of women fell further to 20 %.

In view of this under-representation of women – and other designated groups – in nominations to Canada Research Chairs, the Program has made a strong commitment to equity, diversity and inclusion⁶. In order to bridge the existing gaps in the allocation of research chairs and to improve transparency and governance in the recruitment processes, institutions that administer funds obtained through the CRCP are therefore required to produce an action plan.

To this end, HEC Montréal has developed ambitious strategies to create an inclusive workplace and address any disadvantages faced by designated groups within its research and knowledge transfer community.

HEC Montréal believes that diversity is a source of wealth that should not be the subject of any compromise. This is why the School fully adheres to the principles of equity, diversity and inclusion. Its commitment is clear: all qualified candidates have an equal opportunity to hold a School or Canada Research Chair, regardless of their gender, race, disability or ancestry.

Therefore, this action plan serves as a benchmark for all the efforts made by HEC Montréal to honour this commitment.

3.2 A BOLD ACTION PLAN

The Action Plan for Equity, Diversity and Inclusion in Research at HEC Montréal entitled “Equity, Diversity and Inclusion: The Keys to Excellence in Research” is the result of an extensive consultative process. A supervisory committee was also involved at each stage of the plan’s development process and will ensure its monitoring and implementation in the coming years. This committee consists of the Director of HEC Montréal (Michel Patry), the Director of Research and Knowledge Transfer (Robert Gagné), the Faculty Affairs Director (Claude Laurin) and a research chairholder appointed by the Assembly of Professors (Gilbert Laporte). During the drafting of the action plan, this committee worked closely with a professor and an officer representing two of the designated groups, i.e., a woman (Caroline Aubé) and a visible minority member (Bernard Bizimana). Furthermore, since there are no professors or officers in the School who voluntarily declared themselves to be either an Indigenous person or a person with disabilities, the committee requested a representative from the Human Resources Office (Geneviève Lutz) to closely monitor the issues related to these two designated groups. The composition of the committee is described in Appendix A.

The development of this action plan provided an opportunity for HEC Montréal to study its current practices in the recruitment, selection and retention of its researchers, and to also identify the progress, challenges and opportunities ahead. The results of such reflections are explained in the following section.

This state of affairs led to the development of three priorities based on hard-hitting objectives. In order to meet these objectives, HEC Montréal has developed a strategic plan consisting of a series of tangible and measurable actions. This action plan, which is much more than just a list of objectives and strategies, is consistent with HEC Montréal’s tradition of excellence and serves as a source of inspiration for the entire academic community.

6. <http://www.chairs-chaire.gc.ca/program-programme/equity-equite/index-eng.aspx>

4. ABOUT HEC MONTRÉAL

4.1 RENOWNED BUSINESS SCHOOL

Quebec business leaders founded HEC Montréal in 1907 to help Francophones assume the highest orders of business and economic power. Since then, HEC Montréal has asserted its leadership as a dynamic player in its own community, where it remains deeply rooted, as well as on the world stage.

Drawing on a remarkable pool of world-class professors and researchers – experts in every field of management – the School plays a key role in advancing society through ground-breaking teaching that integrates innovative content and methods at all levels; pioneering research that continuously pushes the boundaries of management science; and fruitful partnerships that enable the transfer of new knowledge and fresh perspectives.

As testimony to its excellence, HEC Montréal was the first business school in North America to be awarded the three most prestigious international accreditations in its field: AACSB International⁷, EQUIS⁸ and AMBA⁹.

4.2 FACTS AND FIGURES

HEC Montréal has:

- 293 professors, including 20 fellows and members of the Royal Society of Canada;
- More than 14,000 students from 156 different countries;
- More than 7,000 executives and managers trained each year;
- More than 91,200 alumni;
- \$27 million¹⁰ in research funds in its 62 Research and Knowledge Transfer Units (including Research Chairs)¹¹.

7. <http://www.aacsb.edu/>

8. <http://www.efmd.org/>

9. <https://www.mbaworld.com/>

10. This amount includes \$3.3 million in funding for community service projects.

11. 2017-2018 data

5. STATE OF AFFAIRS

5.1 CURRENT PROFILE

5.1.1 Canada Research Chairs

The CRCP has allocated a total of seven Canada Research Chairs to HEC Montréal, which are funded either by the Natural Sciences and Engineering Research Council of Canada (NSERC) or the Social Sciences and Humanities Research Council (SSHRC). The Chairs are distributed as follows:

Title	Chairholder	Tier	Source of funding	Beginning of the term	End of the term
CRC in Distribution Management	Gilbert Laporte	1	NSERC (special allocation)	2001-04-01	2022-03-31 (3 rd term)
CRC in Risk Management	Georges Dionne	1	SSHRC	2004-01-01	2024-12-31 (3 rd term)
CRC in Decision Making Under Uncertainty	Erick Delage	2	NSERC	2014-06-01	2019-05-31 (1 st term)
CRC in Economics	Decio Coviello	2	SSHRC	2016-06-01	2021-05-31 (1 st term)
CRC in Micro Finance	Alexandre Jeanneret	2	SSHRC	2018-04-01	2023-03-31 (1 st term)
CRC in Supply Chain Analytics	Yossiri Adulyasak (visible minority)	2	NSERC (special allocation)	2018-04-01	2023-03-31 (1 st term)
CRC in Digital Communication and Multitasking (under embargo)	Ann-Frances Cameron	2	NSERC (special allocation)	2019-01-01	2023-12-31

As shown in the table, ever since the Action Plan for Equity, Diversity and Inclusion in Research was submitted in 2017, we now have a new Canada Research Chair holder who is a visible minority and another one who is a woman.

The corridor of flexibility is not being currently used, since, owing to its size, the school already has three Special Chair allocations¹².

12. The corridor of flexibility provides universities with a set number of “flexible chairs”. This allows universities to change the tier or the research area of a limited number of their allocations. HEC Montréal’s corridor of flexibility is 5.

5.1.2 Governance

The creation of chairs and the selection of chairholders fall within the purview of HEC Montréal's Chairs Committee. This committee, governed by the Policy on the Management of Chairs (Appendix B), consists of:

- the Director of the School, acting as Chairman;
- the Director of Research and Knowledge Transfer;
- the Director of Faculty Affairs;
- a chairholder from the School appointed by the Assembly of Professors (renewable term of two years).

This committee establishes all the processes related to Research Chairs in the School. This is the same committee that ensures governance and follow-up of the Action Plan for Equity, Diversity and Inclusion in Research.

5.2 PROGRESS

HEC Montréal has long recognized the importance of creating a climate of research and knowledge transfer that promotes equity, diversity and inclusion. Over the years, several measures have been put in place to this end, and they are the solid foundations upon which this action plan is based. Here are some examples of the progress that has been achieved.

5.2.1 Recruitment of Professors

HEC Montréal selects new faculty members with the help of its eleven departments in which recruitment subcommittees are formed. Each time one of these ad hoc committees is formed, special attention is paid to equity, diversity and inclusion. Thus, HEC Montréal ensures that the people involved in the decision-making process regarding recruitment and selection of professors include, as far as possible, representatives from the designated groups. Between 2015 and 2017, nearly 25 % of the members of these subcommittees were women. In the Department of Logistics and Operations Management for example, three women were recruited in 2016, as against one man.

HEC Montréal is a French-language institution, open to the world. In accordance with its Language Policy¹³, the normal language of instruction and daily operations is French, although it reserves the right to offer courses in other languages.

HEC Montréal offers French classes to all the new non-French-speaking professors, so that they will be able to teach in French by their third year here (HEC Montréal prerequisite for each new professor). This not only fosters the emergence of an inclusive culture within the academic community, but also helps to diversify the pool of researchers who can aspire to holding a Canada Research Chair. In order to promote integration, we also provide opportunities for spouses to take French classes in groups during the first two years of recruitment.

HEC Montréal also offers a support program for relocation and immigration to new professors and, where applicable, their families (spouse and children).

5.2.2 Recruitment and Selection of Research Chairholders

In 2004, HEC Montréal introduced its Policy on the Management of Chairs (Appendix B). The setting up of an open and rigorous process for recruiting chairholders is at the crux of this policy, which has been revised and updated several times in order to continue observing best practices. During an internal recruitment of a chairholder, all professors receive the postings on their personal email. The criteria for assessing candidates (Appendix C) are related to research efforts, regardless of gender, race, disability or ancestry. The Chairs Committee ensures that this recruitment process is as transparent as possible and consistent with the Program's requirements.

Right from the beginning of the recruitment process, internal (Appendix D) and external (Appendix E) job postings contain statements about transparency and inclusion.

Internal Job Postings

In the interests of transparency, internal job postings convey basic information such as the level of the Chair position and the contact details of a resource person. Since 2017, they also include a statement encouraging people from the four designated groups to apply. Currently, these postings are sent by the Research and Knowledge Transfer Office to all the faculty members of the School, without distinction.

External Job Postings

For several years now, external job postings have been drafted in the interests of transparency: they include a statement on equity, diversity and inclusion and are published all over the world.

13. According to the School's Language Policy, "HEC Montréal is a major French-language management school with an international reputation, and it is committed to being a leader in the quality of French used in management studies and in the dissemination of French business terminology".

5.2.3 Assessment, Renewal and Elimination of Research Chairs

Every chair as well as its holder must undergo rigorous, periodic assessments by the Chairs Committee, as per the process established in the Policy on the Management of Chairs (Appendix B). Regardless of whether the mandate is renewable or not, the assessment process is initiated at the end of the year preceding the end of the current term so that the results of the assessment may be available upon expiry of this term.

The assessment of a chair and its holder is subject to review by the Chairs Committee, which must first decide if the chair is to be maintained or closed down, on the basis of various criteria (capitalization, willingness or agreement of the partners, the importance of the field, availability of funds, productivity of the chair, etc.). If the Chairs Committee decides to maintain the chair, it must decide whether to renew the term of the current chairholder or select and recruit another chairholder for the next term.

5.2.4 Canada Research Chairs

In matters of renewals and career advancement prospects for the Canada Research Chairs, the Chairs Committee is responsible for making decisions based on the criteria set out in the Policy on the Management of Chairs (Appendix B and C), as is the case with the other Research Chairs in HEC Montréal.

The Chairs Committee may also use the flexibility margin offered to HEC Montréal, where necessary. Since the implementation of the 2017-2019 Action Plan for Equity, Diversity and Inclusion in Research, the Chairs Committee is also henceforth entrusted with overseeing the achievement of goals set by the CRCP in making decisions related to the Canada Research Chairs. Incidentally, it was the Chairs Committee which decided to convert a Tier 1 Chair into two Tier 2 Chairs in 2017. This decision ensured that targets were met by increasing the career advancement prospects for young researchers, including those from designated groups.

During the phasing out of a Canada Research Chair (which actually happened in the 2008 calculation), the Chairs Committee assesses the achievements of each chairholder based on the criteria established in the Policy on the Management of Chairs (Appendix B and C) and takes into account the School's Research and Knowledge Transfer Strategic Plan (Appendix H) in order to balance the presence of Canada Research Chairs in HEC Montréal's three priority areas for research and knowledge transfer.

5.2.5 Existing Policies and Regulations

HEC Montréal has always focused specifically on challenges related to equity, diversity and inclusion, especially in the formulation of its regulations that frame research and knowledge transfer.

In its Regulations on sabbaticals, leaves and scholarships for current and future professors, the School is committed to reintegrating a professor upon his return from leave without pay (maternity or paternity leave, for example) in the same rank and in the same position, without penalties (Appendix F).

The aggregation and tenure processes for professors are governed by the regulations on appointments and promotions of professors (Appendix G). According to these regulations, paternity or maternity leave and leave without pay are not reflected in the service records. These provisions are in place to establish clear guidelines, but the School remains flexible in the application of the regulations in order to grant everyone fair treatment and equal access to opportunities for advancement.

Candidates for Canada Research Chairs, who have taken career leave, are also not disadvantaged by the CRCP. In fact, the CRCP stipulates that assigning a chairholder for a Tier 2 CRC may contravene the rule following acceptable and legitimate justifications, such as interruptions in the candidate's research career due to maternity leave or paternity leave, extended sick leave, clinical training or care of a family member.

5.2.6 Framework for Research Chairholders

HEC Montréal has established certain guidelines to oversee research chairholders and to facilitate their integration into the workplace.

To start with, HEC Montréal's Research and Knowledge Transfer Strategic Plan 2015-2020 (Appendix H) contains three priority research areas:

AXE 1	<p>Efficiency, effectiveness and management in organizations</p> <p>This research area encompasses the operational and tactical aspects of organizations as well as their performance in both human and economic terms.</p>
AXE 2	<p>Strategic development of organizations</p> <p>This area of research concerns the evolution of organizations and innovation.</p>
AXE 3	<p>The social, economic and political environment of organizations</p> <p>This research area encompasses interactions between organizations and their environment.</p>

HEC Montréal ensures the presence of Research Chairs (including Canada Research Chairs) in these three research areas of the strategic plan, thereby creating a stimulating framework for its chairholders.

The Research and Knowledge Transfer Office fully supports all the obligations of every chairholder. Furthermore, the Research and Knowledge Transfer Office ensures that HEC Montréal's Policy on the Management of Chairs is implemented and respected, makes sure that the decisions taken by HEC Montréal's Chairs Committee are implemented, and is responsible for the commitments made by the School for all the chairholders. For instance, for each chair, the university budget provides scholarships for doctoral students and all chairholders have access to office space, equipment and the required administrative support.

The Policy on the Management of Chairs provides for a reduction of the teaching load for all research chairholders (paid from the funds of the Canada Research Chair, based on the professor's salary). However, this release may not exceed two courses per year in order to allow HEC Montréal students to benefit from the expertise of its researchers (Appendix B). This measure greatly facilitates the integration of chairholders within the School.

The Policy on the Management of Chairs also establishes a protocol for the creation, in specific cases, of an Advisory Committee whose role is to support and advise the chairholder (Appendix B). Each chair also undergoes rigorous, periodic assessments by the Chairs Committee (Appendix B) as stated in item 5.2.3. By overseeing the work of the chairholders, HEC Montréal strives to create an open and transparent research environment within which a culture of equity, diversity and inclusion takes root.

The rules governing the HEC Montréal faculty members are outlined in the Policy on Faculty Activities (Appendix I). These rules are based on collegiality and judgment by peers. These peer review practices are the ultimate safeguard against the gaps that undermine the moral and ethical values of the institution.

5.2.7 Pay Equity

HEC Montréal's policy is to provide fair and equitable compensation to its employees in return for the work they perform. For this, the School's remuneration is based on the principles of internal equity and ensures compliance with the principles of Quebec's Pay Equity Act.

A point-factor method has been chosen for evaluating all the jobs in the School because it is neutral, analytical and systematic in nature. All jobs are therefore evaluated on 18 factors and the result of the evaluation determines the salary class of the job.

5.3 CHALLENGES

Despite the progress made in recent years, HEC Montréal still needs to overcome certain barriers with regard to equity, diversity and inclusion. An analysis of the current situation has identified two main challenges: attracting researchers and retaining researchers.

5.3.1 Attracting Researchers

In recent years, HEC Montréal has stepped up efforts to attract highly qualified researchers through the CRCP, but it has encountered three major barriers:

- According to the School's Language Policy¹⁴, HEC Montréal is a Quebec institution of higher education whose main language of instruction is French. All researchers who are recruited in the School must therefore speak French by their third year of employment here. While many researchers are interested in holding a Canada Research Chair at HEC Montréal, few are ready to meet the language challenge, despite the support provided to them and their partners by the School to promote the learning of French.
- The compensation offered by HEC Montréal, while competitive in comparison with other universities in Quebec, does not match that of the North American universities with which it is competing.
- Family and personal circumstances prevent some researchers from leaving their current research institution to join HEC Montréal.

In 2015 and 2017, HEC Montréal made two offers of Canada Research Chairs to women. Both these researchers were impressed by the School's commitment to excellence and recognized the career advancement opportunities provided by a Canada Research Chair. However, they both refused the offer, one citing the basic salary as the reason, and the other mentioning unfavourable family conditions, despite HEC Montréal's suggestion of a job offer for the spouse in another department.

5.3.2 Retaining Researchers

The School finds it difficult to attract high quality researchers, for the reasons mentioned above, and the CRCP is a valuable tool in this regard. In particular, it provides researchers with an environment that is conducive to research, a very valuable status, and easier access to other sources of funding. In April 2016, thanks to the CRCP and related funding from the Canada Foundation for Innovation, HEC Montréal was able to retain a researcher who was intending to leave the institution. Thus, since chairholders' positions are often filled internally, the challenge lies in creating a diverse and representative pool of professors that promotes the tenure of researchers from designated groups.

5.4 OPPORTUNITIES

The equity targets for the Canada Research Chairs are defined in the table below:

	Women	Visible minorities	Persons with a disability	Indigenous peoples
Equity targets	25%	11%	5%	0.7%
Targets for the 7 chairs	2	1	0	0
Profile HEC 2017	0	0	0	0
Profile HEC 2018	1	1	0	0

14. http://www.hec.ca/direction_services/secretariat_general/juridique/reglements_politiques/documents/politique_linguistique.pdf

6. ACTION PLAN

6.1 VISION

Building on its extensive skills and the strengths of its milieu and striving for continuous improvement, HEC Montréal is committed to playing a leading role in all these spheres. In research and knowledge transfer specifically, HEC Montréal aspires to further expand its international reputation as a world-class institution for research and knowledge transfer in all fields of management.

6.2 PRIORITIES ANCHORED IN HEC MONTRÉAL'S VALUES

Relevance and Boldness

Foster a proactive and innovative research community by encouraging researchers to prioritize research that contributes to business development and the betterment of society.

Commitment

Highlight the individual and collective commitment of members of the HEC Montréal community in the business world, academia and society, so that a maximum number of people can reap the benefits of a research and knowledge transfer ecosystem that is equitable, diverse and inclusive.

Rigour and Respect

Create a climate of intellectual rigour, collegiality, collaboration, integrity and respect at every level of the institution.

6.3 OBJECTIVES

The actions and strategies of the action plan meet five distinct objectives:

RELEVANCE AND BOLDNESS

Objective 1

Expand the pool of qualified researchers who fully represent excellence and diversity.

COMMITMENT

Objective 2

Ensure that information and awareness resources are in place to promote and support an equitable, inclusive and diverse environment across the entire campus.

Objective 3

Meet the equity, diversity and inclusion targets as calculated by the CRCP.

RIGOUR AND RESPECT

Objective 4

Establish processes to address and report concerns regarding equity, diversity and inclusion.

Objective 5

Foster a climate conducive to equity, diversity and inclusion within the entire HEC Montréal community.

6.4 STRATEGIES AND ACTIONS

RELEVANCE AND BOLDNESS

Objective 1			
Expand the pool of qualified researchers who fully represent excellence and diversity.			
Specific strategies	Acceptable actions	Deliverables and measures	Schedule
1.1 Create, update and promote tools and resources to improve the hiring, promotion and retention practices of faculty members and chairholders.	Identify an equity and diversity officer from among the HEC Montréal staff.	Create a job description that meets the requirements of the Canada Research Chairs Program (CRCP) and the specific needs of HEC Montréal.	November 2018
		Get the description and the roles and responsibilities approved by the Human Resources Office, the Research and Knowledge Transfer Office and the Office of Faculty Affairs.	January 2019
		Assign tasks to the designated person(s) who will act as the equity and diversity officer.	February 2019
	Ensure that all individuals taking part in the recruitment and selection process of HEC Montréal faculty members (department chairs, committee members in charge of recruiting and selecting professors) and research chairholders (Chairs Committee) undergo training on the negative impacts of unconscious bias.	Ensure that all individuals taking part in these processes undergo training on unconscious bias.	September 2018 + Recurring for each new person
	Develop a Guide on best practices for recruitment, selection and retention of professors and research chairholders, for stakeholders.	Create the Guide on best practices for recruitment, selection and retention of professors and research chairholders, for HEC Montréal.	June 2019
		Get the Guide approved by the Director, Office of Faculty Affairs and the Chairs Committee.	August 2019
		Present the Guide to all department directors, recruitment and selection committee members and the Chairs Committee.	October 2019 + Recurring annually
	Identify the communication channels for posting job offers to members of designated groups.	Implement a system to collect data on the origin of applications for faculty positions in connection with their voluntary designation to designated groups.	September 2018
		Collect data on the origin of applications for faculty positions and membership to a designated group.	December 2018
		Analyze the data, based on efforts to diversify recruitment sources.	April 2019 + Recurring annually
		Identify recruitment sources to better target specific audiences in connection with the designated groups.	July 2019 + Recurring every summer

Objective 1 (cont.)

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
1.1 (cont.)	Review the internal and external recruitment and selection processes of chairholders, so that they meet the Program requirements.	Produce a mapping of the processes, documents, procedures and recruitment guidelines.	February 2019
		Ensure that all documents meet the Program requirements.	March 2019
		Modify or improve documents that do not meet the Program requirements.	April 2019
		Incorporate the Recruitment Guide (Objective 1.1) into the recruitment and selection process.	October 2019
	Provide faculty members, including chairholders with the necessary resources for reconciling work-study-life.	Analyze data from the annual survey (Objective 5.1) on reconciling work-study-life.	April 2019
		Identify areas requiring corrective action or the creation of new initiatives, in partnership with the Human Resources Office and the Office of Faculty Affairs.	May 2019
1.2 Promote the recruitment, selection and retention of students representing one of the four designated groups to graduate studies at HEC Montréal.	Provide Master's and PhD students with the necessary resources for reconciling work-study-life.	Analyze data from the annual survey (Objective 5.1) on reconciling work-study-personal life for students.	April 2019
		Identify areas requiring corrective action or the creation of new initiatives and incorporate them into the action plan, in partnership with the Office of the Academic Programs Director and Student Services.	May 2019

COMMITMENT

Objective 2

Ensure that information and awareness resources are in place to promote and support an equitable, inclusive and diverse environment across the entire campus.

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
Strengthen and maintain a climate of transparency between the School and the general public, and also vis-à-vis partners, financial donors and other specific audiences.	Create a Diversity, Equity and Inclusion section in the HEC Montréal website. This section should contain, but not be limited to: The Action Plan for Equity, Diversity and Inclusion in Research; The report outlining the progress made by the School towards meeting the CRCP targets regarding equity, diversity and inclusion.	Develop the website content.	January 2019
		Put the section on diversity, equity and inclusion online.	February 2019
	Ensure that job postings include any information that may be required in the interests of transparency.	Systematically review all internal and external job postings for professors and chairholders.	April 2019 onwards
	In the case of a recruitment or retention process for an internal position, ensure that all the internal and external stakeholders are kept updated.	Systematically share the information with all the internal and external stakeholders.	June 2019 onwards

Objective 2 (cont.)

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
Demonstrate strong leadership in matters of diversity, equity and inclusion so as to encourage best practices at every hierarchical level of the School and in all departments.	Reiterate HEC Montréal's commitment to equity, diversity and inclusion every year through a formal statement from its senior representatives.	Include the Director's commitment in the action plan.	December 2017
	Include a statement on diversity, equity and inclusion in promotional materials to recruit new students.	Add an online statement on the School website.	September 2017

Objective 3

Meet the equity, diversity and inclusion targets as calculated by the CRCP.

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
3.1 Identify members of designated groups and actively seek to recruit them.	Establish a process to identify members of designated groups within the current pool of professors, in compliance with best practices. The process will encourage voluntary disclosures, and take into account how the data will be used, privacy safeguards and double counting.	Review the voluntary disclosure form and the databases to ensure the required data is available.	February 2019
		Conduct a communication/information campaign among employees to update the databases.	May 2019
	Review the assessment criteria of research chair candidates to reflect designated groups, for example by requesting a statement of commitment to diversity, equity and inclusion.	Modify the Policy on the Management of Chairs and get it approved by the Academic Council.	May 2018

RIGOUR AND RESPECT

Objective 4

Establish processes to address and report concerns regarding equity, diversity and inclusion.

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
4.1 Establish a complaints process.	Develop an accessible and effective complaints process.	Create an EDI complaints process.	May 2019
	Create a complaint form in the Diversity, Equity and Inclusion section of the website, to make the process as accessible as possible.	Create an EDI complaint form with an e-filing process.	May 2019
	Obtain approval from the relevant offices..	Get the process and form approved by the Human Resources Office, the Research and Knowledge Transfer Office and the Office of Faculty Affairs.	August 2019
	Promote the complaint form and process.	Produce a press release for the entire School staff.	October 2019
	Make an anonymous public accountability report related to the complaints process.	Produce an annual report.	Recurring every year in May

Objective 5

Foster a climate conducive to equity, diversity and inclusion within the entire HEC Montréal community.

Specific strategies	Acceptable actions	Deliverables and measures	Schedule
5.1 Encourage the participation and advancement of people from designated groups.	Promote the equity officer and his role in the process of identifying problems and barriers to diversity and inclusion when welcoming and integrating new professors.	Ensure that all newly hired faculty members are systematically contacted by the equity officer.	May 2019 onwards
		Ensure that all new faculty members fill up the voluntary disclosure form.	May 2019 onwards
	Take the pulse of the HEC Montréal community in terms of equity, diversity and inclusion, including through an annual survey, to identify the challenges to be addressed in a proactive manner.	Conduct an annual survey (which includes a section on EDI) that is adapted to the different members of HEC Montréal (students, faculty and staff).	February 2019
		Analyze the data and produce a report on HEC Montréal's environment and people's perceptions.	March 2019
		Modify the EDI action plan based on the recommendations of the analysis report.	May 2019

7. IMPLEMENTATION AND FOLLOW-UP

The equity targets for HEC Montréal’s Canada Research Chairs consist of awarding two chairs to women and one to a visible minority person, out of a total of seven chairs. HEC Montréal is therefore committed to meeting at least two of these three targets, i.e., two chairholders from the designated groups (women and visible minorities) during the allocation of new chairs between now and 2019. During the renewal of the Chairs, the School will aim to meet the targets required by the CRCP.



APPENDIX A

COMPOSITION OF THE SUPERVISORY COMMITTEE

The supervisory committee for the Action Plan for Equity, Diversity and Inclusion in Research at HEC Montréal consists of the following members:

Michel Patry, Director of the School and Full Professor (Department of Applied Economics)

Robert Gagné, Director of Research and Knowledge Transfer and Full Professor (Department of Applied Economics)

Claude Laurin, Director of Faculty Affairs and Full Professor (Department of Accounting Studies)

Gilbert Laporte, Holder of the Canada Research Chair in Distribution Management and Full Professor (Department of Decision Sciences), appointed by the Assembly of Professors

For the action plan, the committee collaborated with:

Caroline Aubé, Holder of the Chair in Management and Work Team Effectiveness and Full Professor (Department of Management)

Bernard Bizimana, HEC Montréal Library Director

Geneviève Lutz, Director - Organizational Development and Quality of Life in the Workplace (Human Resources Office)

Robert Gagné and Claude Laurin are responsible for answering questions and concerns related to equity, diversity and inclusion:

Robert Gagné

robert.gagne@hec.ca
514-340-6255
Office 3.460F

Claude Laurin

claudelaurin@hec.ca
514-340-6536
Office 5.410D

APPENDIX B

EXTRACTS FROM THE POLICY ON THE MANAGEMENT OF CHAIRS

1. Creation of a Chair

The purpose of creating a chair is to improve, promote and disseminate knowledge in specific fields of research and teaching, fields which are consistent with the mission, vision and strategic objectives of HEC Montréal.

HEC Montréal may create various types of chairs: short-term or long-term chairs, chairs focused on basic, applied or professional research activities, chairs created by HEC Montréal or arising from a partnership between HEC Montréal, a funding agency or industry, “joint” chairs created in association with one or more institutions, research center(s), etc.

The creation of a chair is a prerogative of HEC Montréal’s **Chairs Committee**. This Committee is composed of:

- the Director of the School, acting as Chairman;
- the Director of Research and Knowledge Transfer;
- the Director of Faculty Affairs;
- a chairholder from the School appointed by the Assembly of Professors (renewable term of two years).

A proposal for the creation of a chair must be submitted to the Chairs Committee and this may be done by one or more persons from the School itself (professor, department, director of the HEC Montréal Foundation, etc.) or from outside (potential partner, centre or institute, etc.). Such a proposal should provide all the essential information for its analysis (objectives of the chair, connection to HEC Montréal’s strategy, planned activities, confirmed or potential sources of funding, strategy for attracting and retaining researchers, etc.).

2.2 Terms of Appointment

[...] [...] During their term, chairholders may not obtain more than six credits worth of teaching relief per year, so that HEC Montréal students may benefit from their considerable expertise. Holders who do not claim their six maximum annual teaching relief credits cannot extend them to another professor. All teaching reliefs requested by chairholders must be paid out of the operating budget of their chair at a percentage of their annual salary (the percentage in force is the same for all chairholders). [...]

4. Follow-up of Chair Activities

[...] An Advisory Committee may need to be created for certain chairs. Its role is to support and advise the chairholder so as to maximize the chair’s productivity and benefits. This committee may consist of representatives from HEC Montréal (researchers, Director of Research and Knowledge Transfer or his representative, etc.) and elsewhere (representative(s) of one or more partners, researchers, members of the business community, etc.). [...]

5. Assessment of a Chair and its Holder

Every chair as well as its holder should undergo periodic assessment. Regardless of whether the mandate is renewable or not, the assessment process is initiated at the end of the year preceding the end of the current term so that the results of the assessment may be available upon expiry of this term.

The assessment of a chair and its holder is subject to review by the Chairs Committee, which must first decide if the chair is to be maintained or closed down, on the basis of various criteria (capitalization, willingness or agreement of the partners, importance

If the Chairs Committee decides to maintain the chair, it must decide whether to renew the term of the current chairholder or select and recruit another chairholder for the next term.

A list of criteria that may be used to assess a chair and its holder is provided in the Appendix.

For the purposes of an end-of term assessment, the chairholder must submit a productivity report to the Chairs Committee, which should contain the following information:

- summary including a brief presentation of the chair and its mission;
- a positioning table that shows the distribution of activities in connection with the type of chair, i.e., a professional/applied or research chair;
- composition of the Advisory Committee, if any, and meetings and decisions taken with it;
- status of the inflows (internal and external financing) and outflows of the chair's funds for the period under review;
- description of the resources (human, physical and material) made available to the chair;
- summary of achievements over the period under review (the Appendix lists achievements in each of these areas):
 - publications;
 - training and development;
 - internal and external outreach;
 - procurement of research funds and benefits;
- a chairholder may also add his curriculum vitae for the period under review if he considers this document to be sufficiently different from the chair's activity report.

To decide if the chair and a chairholder's term should be renewed, the Chairs Committee may appoint an external expert in the chair's field of specialty to provide the Committee with his opinion on how the chair and its holder have performed. The Chairs Committee may be assisted in the decision-making process by the relevant persons (Director of the master's or doctoral programs, subject matter experts, colleagues, co-researchers, partners, etc.).

Furthermore, in consultation with the Director of HEC Montréal, the Director of Research and Knowledge Transfer seeks the advice of at least three external experts to HEC Montréal who can be chosen on the basis of suggestions from the holder. The advice of the external experts pertains to the end-of-term productivity report of the chairholder.

In exceptional cases, the Chairs Committee may conduct the assessment of a chair and its holder before the end of his term. In such a situation, the Chairs Committee shall evaluate the productivity report for the period in question, by following the same process and respecting the same criteria applied to an end-of-term assessment.

Before publicly announcing the renewal of a chairholder's term, the Director of HEC Montréal must notify the members of the Academic Council.

APPENDIX C

CRITERIA FOR ASSESSING CANDIDATES

The Research and Knowledge Transfer Office evaluates each internal candidate according to a statistical grid. This grid presents the researcher's total number of publications and citations (Google Scholar, Web of Science and Publish or Perish), as well as the number of publications which are accepted, forthcoming, submitted or under revision.

The Human Resources Office has also created evaluation grids used to analyze the performance of Canada Research Chair candidates.

The indicators used for the appointment and assessment of a chairholder are clearly identified in the Appendix of the Policy on the Management of Chairs (see Appendix B), and also see below:

Indicators
<p>Publications (e.g., articles in scientific and professional journals, books or parts of books, research papers, papers published in conference proceedings, expert reports, monographs, book reviews or summaries)</p> <ul style="list-style-type: none">• Quantity and quality assessed by the research excellence recognition policy;• Originality and impact on the discipline or field;• Importance and relevance of dissemination to a lay audience.
<p>Training and development</p> <ul style="list-style-type: none">• Teaching: number and type of courses taught, student evaluations of the teaching, teaching provided in the master's and doctoral programs at HEC Montréal and elsewhere;• Supervision of master's theses and doctoral theses and awarding of scholarships to students;• Development of programs, courses, educational material (e.g., cases, videos, software) focused on the objectives of the chair. When a holder accumulates significant achievements in this respect, he may attach the corresponding appraisals made by the program directors concerned;• Contribution to the development of young colleagues and involvement of other HEC Montréal researchers in the activities of the chair.
<p>Internal and external outreach</p> <ul style="list-style-type: none">• Participation in scientific or professional symposia as a speaker, moderator, chairperson, etc.;• Organization of scientific or professional symposia, seminars or conferences;• Collaboration with other HEC Montréal researchers and researchers from other universities or research organizations in Quebec, Canada and abroad;• Publications (e.g., books, conference proceedings, manuals);• Extent and nature of involvement in editorial committees of scientific or professional journals and executive committees of scientific or professional associations;• Evaluation of papers submitted to journals, grant applications, etc.;• Awards, scholarships, accolades or honours in research and education;• Presentations in HEC Montréal (e.g., Midis de la Recherche);• Community services related to the field of the chair;• Successful attraction of students or postdoctoral interns, etc.
<p>Research funds and benefits</p> <ul style="list-style-type: none">• Requests for external research funding (e.g., grants, contracts) and successful procurement of these funds;• Extent and quality of the chair's results and activities with respect to the size of the funds and resources it receives;• Efficiency and relevance of use of the chair's funds with respect to the chair's mission.

HEC MONTRÉAL

Call for nominations for a research chair

HEC Montréal invites applications from exceptional researchers to fill a Chairholder's position for a

Tier 2 Canada Research Chair

REQUIREMENTS

Candidates must:

- be assistant or associate professors in HEC Montréal;
- have obtained a PhD in 2008 or later, in a discipline related to management sciences;
- be excellent emerging world-class researchers who have demonstrated exceptional research creativity and a marked interest for publications; conferences and publications should attest to this ability;
- have demonstrated the potential to achieve international recognition in their fields over the next five to ten years;
- As a chairholder, have the potential to attract excellent interns, graduate students and future researchers;
- Demonstrate teaching excellence;
- Meet the overall Canada Research Chair program requirements (<http://www.chairs-chaire.gc.ca/>).

SUBMISSION OF AN APPLICATION

Interested candidates must submit their application (in 4 copies) **no later than June 2, 2017** to:

Robert Gagné
Director, Research and Knowledge Transfer

The application file must include:

- A letter describing the motives for applying to said position;
- A description of the Chair research program (maximum 5 pages);
- An updated curriculum vitae;
- The contact details for two references outside HEC Montréal.




HEC Montréal encourages applications from women, indigenous peoples, persons with disabilities and visible minorities.

Additional information can be obtained from the Director of Research and Knowledge Transfer (514-340-6255 or robert.gagne@hec.ca).

In this document, the use of the masculine to designate persons has no other purpose than that of brevity.

APPENDIX E

EXAMPLE OF EXTERNAL JOB POSTING

HEC MONTRÉAL	
<p>HEC Montréal est une grande école de gestion d'envergure internationale. Elle mise sur un corps professoral qui excelle en matière d'enseignement et de recherche en gestion. Elle offre des programmes de premier cycle ainsi que des diplômes d'études supérieures, un MBA, un EMBA, une M.Sc. et un Ph. D. en administration. Elle offre des cours principalement en français, mais également en anglais et en espagnol.</p>	
<h3>PROFESSEURS, PROFESSEURES</h3>	
<p>HEC Montréal applique un programme d'accès à l'égalité en emploi et invite les femmes, les Autochtones, les minorités visibles, les minorités ethniques et les personnes handicapées à présenter leur candidature.</p> <p>Conformément aux règles d'immigration, nous encourageons tous les candidats qualifiés à postuler; la priorité sera toutefois accordée aux Canadiens ainsi qu'aux résidents permanents.</p> <p>L'École remercie les personnes qui manifestent leur intérêt en déposant leur candidature. Toutefois, seules les personnes retenues pour une entrevue recevront une réponse.</p>	<p><i>Affaires internationales</i> <i>Économie appliquée</i> <i>Finance</i> <i>Gestion des opérations et de la logistique</i> <i>Gestion des ressources humaines</i></p> <p><i>Management</i> <i>Marketing</i> <i>Sciences comptables</i> <i>Sciences de la décision</i> <i>Technologies de l'information</i></p> <p>EXIGENCES</p> <ul style="list-style-type: none"> • Posséder ou être sur le point de terminer un doctorat dans la discipline appropriée. • Faire preuve d'excellentes qualités de pédagogue. • Démontrer des habiletés au niveau de la recherche et un intérêt marqué pour la publication; des écrits et des conférences antérieurs témoigneront de cette capacité. • Posséder une très bonne connaissance des environnements technologiques et des logiciels couramment utilisés en gestion.
<h3>TITULAIRES D'UNE CHAIRE DE RECHERCHE DU CANADA DE NIVEAU 2</h3>	
<p>HEC Montréal désire pourvoir des postes au 1^{er} juin 2015.</p> <p>Les personnes intéressées feront parvenir leur curriculum vitae accompagné d'une lettre de présentation, en précisant leur citoyenneté, avant le 15 octobre 2014.</p>	<p>Dans le cadre du processus de sélection des professeurs, les candidats qui postuleront pourraient se voir offrir la possibilité de devenir titulaire d'une Chaire de recherche du Canada de niveau 2. Pour ce faire, les candidats devront :</p> <ul style="list-style-type: none"> • être nommés au rang d'adjoint ou d'agrégé ou posséder les qualifications nécessaires pour occuper un poste de ce niveau; • avoir obtenu un doctorat en 2005 ou après, dans une des disciplines susmentionnées; • être d'excellents nouveaux chercheurs de calibre mondial faisant preuve d'une très grande créativité en recherche et d'un intérêt marqué pour la publication; des écrits et des conférences antérieurs en témoigneront; • démontrer qu'ils sont susceptibles de gagner la reconnaissance internationale à titre de chefs de file dans leur domaine au cours des cinq à dix prochaines années; • pouvoir, une fois titulaires de chaire, recruter d'excellents stagiaires, étudiants aux cycles supérieurs et futurs chercheurs; • faire preuve d'excellentes qualités de pédagogue; • répondre aux exigences du Programme des chaires de recherche du Canada (www.chairs-chaire.gc.ca).
  	<p>Par courriel: rh.prof@hec.ca Par courriel: HEC Montréal - Direction des ressources humaines 3000, chemin de la Côte-Sainte-Catherine Montréal (Québec) H3T 2A7</p>
<p>www.hec.ca</p>	

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Plusieurs domaines/disciplines

HEC Montréal

Endroit: Québec

Date d'affichage: 2014-08-12

HEC Montréal est une grande école de gestion d'envergure internationale. Elle mise sur un corps professoral qui excelle en matière d'enseignement et de recherche en gestion. Elle offre des programmes de premier cycle ainsi que des diplômes d'études supérieures, un MBA, un EMBA, une M.Sc. et un Ph.D. en administration. Elle offre des cours principalement en français, mais également en anglais et en espagnol.

HEC Montréal désire pourvoir des postes au 1er juin 2015.

Professeurs, professeures

- Affaires internationales
- Économie appliquée
- Finance
- Gestion des opérations et de la logistique
- Gestion des ressources humaines
- Management
- Marketing
- Sciences comptables
- Sciences de la décision
- Technologies de l'information

Exigences :

- Posséder ou être sur le point de terminer un doctorat dans la discipline appropriée.
- Faire preuve d'excellentes qualités de pédagogue.
- Démontrer des habiletés au niveau de la recherche et un intérêt marqué pour la publication; des écrits et des conférences antérieurs témoigneront de cette capacité.
- Posséder une très bonne connaissance des environnements technologiques et des logiciels couramment utilisés en gestion.

Titulaires d'une Chaire de recherche du Canada de niveau 2

Dans le cadre du processus de sélection des professeurs, les candidats qui postuleront pourraient se voir offrir la possibilité de devenir titulaire d'une Chaire de recherche du Canada de niveau 2. Pour ce faire, les candidats devront :

- être nommés au rang d'adjoint ou d'agrégé ou posséder les qualifications nécessaires pour occuper un poste de ce niveau;
- avoir obtenu un doctorat en 2005 ou après, dans un des disciplines susmentionnées;
- être d'excellents nouveaux chercheurs de calibre mondial faisant preuve d'une très grande créativité en recherche et d'un intérêt marqué pour la publication; des écrits et des conférences antérieurs en témoigneront;
- démontrer qu'ils sont susceptibles de gagner la reconnaissance internationale à titre de chefs de file dans leur domaine au cours des cinq à dix prochaines années;
- pouvoir, une fois titulaire de chaire, recruter d'excellents stagiaires, étudiants aux cycles supérieurs et futurs chercheurs;
- faire preuve d'excellentes qualités de pédagogue;
- répondre aux exigences du Programme des chaires de recherche du Canada (<http://www.chairs-chaire.gc.ca>).

Les personnes intéressées feront parvenir leur curriculum vitae accompagné d'une lettre de présentation, en précisant leur citoyenneté, **avant le 15 octobre 2014**.

Par courriel :

rh.prof@hec.ca

Par courrier :

HEC Montréal

Direction des ressources humaines

3000, ch. de la Côte-Sainte-Catherine

Montréal (Québec) H3T 2A7

Canada

<http://www.hec.ca>

HEC Montréal applique un programme d'accès à l'égalité en emploi et invite les femmes, les Autochtones, les minorités visibles, les minorités ethniques et les personnes handicapées à présenter leur candidature.

Conformément aux règles d'immigration, nous encourageons tous les candidats qualifiés à postuler; la priorité sera toutefois accordée aux Canadiens ainsi qu'aux résidents permanents.

L'École remercie les personnes qui manifestent leur intérêt en déposant leur candidature. Toutefois, seules les personnes retenues pour une entrevue recevront une réponse.

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Multiple Positions

HEC Montréal

Location: Quebec

Date posted: 2014-08-12

HEC Montréal is recognized as a world leader in business education. HEC professors maintain high standards of excellence both in their teaching and in their research. The school offers undergraduate programs, as well as Graduate diplomas, MBA, EMBA, Master's degree and Ph.D. in Administration. The main language of instruction at HEC is French; however, there are also programs and courses offered in English and in Spanish.

HEC Montréal has openings beginning June 1, 2015.

Professors

- Accounting Studies
- Applied Economics
- Decision Sciences
- Finance
- Human Resources Management
- Information Technologies
- International Business
- Logistics and Operations Management
- Management
- Marketing

Requirements :

- Candidates must either have a Ph.D., or be near completion of a Ph.D. in the relevant discipline.
- Teaching excellence is required, as well as a strong aptitude for research and a marked interest for publication; recent conferences and publications will attest to this ability.
- Candidates must have a very good knowledge of technological environments and of software applications commonly used in business.

Tier 2 Canada Research Chairholders

In the course of the selection process for faculty positions, candidates may be invited to apply for a Tier 2 Canada Research Chair. To be considered, candidates must:

- be assistant or associate professors, or possess the necessary qualifications to be appointed at these levels;
- have obtained a Ph.D. in 2005 or later, in one of the above-mentioned discipline;
- be excellent emerging world-class researchers who have demonstrated particular research creativity and marked interest for publication; conferences and publications will attest to this ability;
- have demonstrated the potential to achieve international recognition in their fields in the next five to ten years;
- as a chairholder, have the potential to attract excellent trainees, graduate students and future researchers;
- demonstrate teaching excellence skills;
- meet the Canada Research Chairs program requirements (<http://www.chairs-chaire.gc.ca>).

Candidates must forward a full curriculum vitae with cover letter, specifying citizenship, by **October 15th, 2014**.

By e-mail:

rh.prof@hec.ca

By mail:

HEC Montréal

Direction des ressources humaines

3000, ch. de la Côte-Sainte-Catherine

Montréal (Québec) H3T 2A7

Canada

<http://www.hec.ca>

HEC Montréal is committed to Employment equity and encourages applications from women, Aboriginal peoples, visible and ethnic minorities and persons with disabilities.

All qualified candidates are encouraged to apply; however Canadians and permanent residents will be given priority.

We thank all applicants for their interest. However, only those selected for an interview will be contacted.

APPENDIX F

EXTRACT FROM THE REGULATIONS ON SABBATICALS, LEAVES AND SCHOLARSHIPS FOR CURRENT AND FUTURE PROFESSORS

4.5. Obligations of the School

1. When a professor returns to HEC Montréal from leave without pay, the latter must reintegrate him in the same rank and same position he occupied prior to his leave.
2. The professor can continue to participate in the group insurance plans and pension plan (in the latter case through the redemption of years of service only, provided that he assumes all the costs).

APPENDIX G

EXTRACT FROM THE REGULATIONS ON APPOINTMENTS AND PROMOTIONS OF PROFESSORS

3.1.2 Service Records

In order to become an associate, professors must, as of June 1 of the year of promotion, meet one of the following conditions:

- a) They should have taught as assistant professor for a period of at least fifty-three months and have a minimum of seven years' experience from the time of obtaining the degree which served as the basis for their classification;
- b) They should have completed a full workload of at least thirty-three consecutive months as a visiting professor with career prospects;
- c) They should be in a situation deemed equivalent to either of the above two situations.

The service records for aggregation are established from the time candidates are appointed as assistant professors or visiting professors with career prospects. Periods in which candidates have been on sick leave, parental leave, maternity leave or leave without pay (except leave without pay at another university) are not counted in the service records. However, candidates may include in their teaching record, the teaching evaluations they received, and the teaching material produced within a seven-year period (to which are added the periods of leave) calculated from the deadline for submitting applications for aggregation. Candidates may also include publications and other works produced during this same period, in their research file. Any other elements included or referred to in the file relate exclusively to the service records as defined above.

APPENDIX H

EXTRACT FROM THE RESEARCH AND KNOWLEDGE TRANSFER STRATEGIC PLAN

PRIORITY AREAS FOR RESEARCH AND KNOWLEDGE TRANSFER

In keeping with HEC Montréal's mission, its research and knowledge transfer activities span all fields of management. These activities are focused on three priority research areas based on current and future issues that are relevant to the management world.

Research Area 1: Efficiency, effectiveness and management in organizations

This research area encompasses the operational and tactical aspects of organizations as well as their performance in both human and economic terms.

In particular:

- Decision support and the optimization of business processes;
- Supply chain management;
- Development of skills and know-how;
- Work organization, re-engineering of business processes and change management;
- Governance and financial management.

Research Area 2: Strategic development of organizations

This area of research concerns the evolution of organizations and innovation.

In particular:

- Entrepreneurship and leadership;
- Development and assessment of new business models;
- Business development;
- Implementation and use of new technologies;
- Design and deployment of marketing strategies;
- Creation, production and delivery of value.

Research Area 3: The social, economic and political environment of organizations

This research area encompasses interactions between organizations and their environment.

In particular:

- The dynamics of financial markets and investments;
- Evolution of the international context;
- Integration in value chains and strategic partnerships;
- Understanding consumer needs;
- Competitive intelligence and technology watch;
- All types of risk management;
- Evolution of the labour market;
- Sustainable development and corporate social responsibility;
- Public policy development and impacts.

APPENDIX I

EXTRACT FROM THE POLICY ON FACULTY ACTIVITIES

PREAMBLE:

1.1 HEC Montréal is a secular institution where, over the years, the rules that govern faculty members (which include assistant professors, associate professors, incumbents, guests and visitors) have been forged on the basis of the collegiality and judgment of peers. It is such peer review practices that are ultimately the last bulwark against any deviation that might challenge the intellectual and social contributions, as well as the integrity and moral values of the institution and all its faculty. So, the following rules should be understood as an explicit complementary guide to these broad principles which often remain implicit. They govern faculty behaviour, but cannot be a substitute for the *Regulations on appointments and promotions of professors* (RNPP).

APPENDIX J

TRAINING ON UNCONSCIOUS BIAS

All individuals taking part in the process of recruiting and selecting faculty members and research chair holders at HEC Montréal, including department chairs, subcommittee members in charge of recruiting and selecting professors and the Chairs Committee must undergo training on the negative impact of unconscious bias.

The online training, recommended by the CRCP, entitled *Les préjugés inconscients et le processus d'évaluation par les pairs* (Unconscious Bias and the Peer Review Process) is around 25 minutes long. Apart from defining unconscious bias and highlighting its impact on the assessment and recruitment of researchers, it proposes a series of individual and institutional guidelines that are applicable to all areas of research and teaching.