



## Designation and Consultation Process

### Management and Professional Staff

#### Introduction and Purpose

1. On April 12, 2018, the Faculty Association wrote to the Chair of the Board of Governors (Board) requesting that all MaPS be designated academic staff.
2. On May 25, 2018, the Board delegated to the Provost and Vice-President Academic (Provost) and Vice-President Finance and Service (VPFS) the authority to develop and implement a designation and consultation process (Process) for the consideration of the Faculty Association's request to designate MaPS as academic staff.
3. The purpose of this Process is to guide the review of MaPS positions and the recommendations to the Board for designation of academic staff. It may be amended as necessary by the Provost and VPFS.
4. The Process is an effort to address the Faculty Association's request in a timely, constructive, and efficient manner. The Process was created for this specific request, not to establish a university policy or official process to designate academic staff.

#### Mandate

5. The Human Resources and Governance Committee (Committee) of the Board delegated to the Provost and VPFS the authority to:
  - Develop a process compliant with the requirements of the *Post-Secondary Learning Act* to review the request by the Faculty Association to designate MaPS as academic staff; and
  - Implement the process to review MaPS positions and prepare recommendations to the Committee with respect to a decision to designate MaPS as academic staff.
6. The review of MaPS will be limited to positions located within the Province of Alberta and will not include any vacant MaPS positions.

#### Process Phases

7. The Provost and VPFS will assemble an internal working group to complete the Process and make a recommendation on the designation request to the Board. The Process will be six phases and as follows:

#### ***Phase 1 – Preliminary Review and exclusion of Administrative and Business Units***

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8. The Faculty Association exercises representation rights over academic staff at the university, but has no representational right over non-academic personnel. MaPS working in administrative and business units at the university work principally on non-academic endeavours.
9. A preliminary review will be conducted in Phase 1 to decide whether any further review of MaPS positions in the following administrative and business units is necessary:

<b>Administrative and Business Units</b>		
Ancillary Services	Information Technologies	VP Development
Facilities Development	Office of Sustainability	VP Facilities
Facilities Management	Planning and Resource Allocation	VP (Finance and Services)
Finance	Risk	VP University Relations
Human Resources	Supply Chain Management	Office of the President
Legal Services	University Secretariat	

10. The internal working group will conduct the preliminary review of MaPS positions in the administrative and business units listed in the table above to confirm they do not perform academic work.
11. If the internal working group determines there are any positions within these administrative and business units needing further review they will be included in Phase 3.

***Phase 2 - Preliminary Review of MaPS Career Bands and exclusion of clerical staff***

12. MaPS are classified into five career bands and each band has multiple levels that reflect the range of distinct work and progressive expectations they have across the university.
13. MaPS career bands are as listed in the table below:

<b>Career Band</b>	<b>Levels</b>
Management	M1 – M4
Research	R1 – R6
Professional	P1 – P5 and P3L – P5L
Technical Professional	T1 – T5
Operational and Administrative Support	O1 – O4

14. Similar to the administrative and business units, the primary duties and responsibilities of Operational and Administrative Support MaPS are administrative in nature and do not include academic work. Some examples of titles within this career band include Executive Assistant and Administrative Assistant.

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15. The internal working group will conduct a preliminary review of MaPS positions in the Operational and Administrative Support career band to confirm and validate that they do not perform academic work.
16. If the internal working group determines there are any positions within the Operational and Administrative Support career band that require further review they will be included in Phase 3.

**Phase 3 - Documentary Review of Remaining MaPS Positions (e.g. Organizational Charts, Job Profiles)**

17. The internal working group will use the indicators set out in paragraph 26 below to review the remaining MaPS positions within the following faculties and units::

University Faculties and Units		
Arctic Institute of NA	Faculty of Nursing	Office of the Provost and VP Academic
Cumming School of Medicine	Faculty of Science	Schulich School of Engineering
Environmental Design	Faculty of Social Work	Student and Enrolment Services
Continuing Education	Faculty of Veterinary Medicine	School of Public Policy
Faculty of Arts	Haskayne School of Business	Taylor Institute for Teaching and Learning
Faculty of Graduate Studies	Institute of Energy	University of Calgary International
Faculty of Kinesiology	Library & Cultural Resources	VP Research
Faculty of Law	Indigenous Engagement	Werklund School of Education
Office of Institutional Analysis	Office of Diversity, Equity and Protected Disclosure	

18. In Phase 3, the internal working group will compile organizational charts, job profiles and other available information as necessary to assess MaPS positions and determine whether their roles are appropriate for designation as academic staff, or whether certain roles should be excluded as non-academic staff, or alternatively, excluded on the basis that certain roles perform managerial functions or confidential labour relations work.
19. MaPS incumbents and their managers will be engaged as necessary to validate the nature of the MaPS roles. Phase 3 will end when the internal working group completes its review and identifies all MaPS positions that may potentially be appropriate to designate as academic staff.

**Phase 4 – Consultation with the Faculty Association**

20. In Phase 4, the Faculty Association will have an opportunity to provide its input on the positions that have been identified as potentially appropriate to designate as academic staff by the internal working group. The internal working group will also provide the Faculty Association a full listing of MaPS

positions that have been identified as not performing academic work and the Faculty Association will have an opportunity to provide its input on any positions they consider to primarily perform academic work but were not so identified by the internal working group.

21. The internal working group will consider the results of the consultation in preparing their initial recommendations.

***Phase 5 – Communication with the Faculty Association and AUPE of initial recommendations and opportunity to provide additional information***

22. The internal working group will confidentially share its initial recommendations on designation of positions with the Faculty Association and AUPE. The initial recommendations shared with AUPE will be limited to those that impact positions they have requested be included in their bargaining unit.
23. The Faculty Association and AUPE will be provided with an opportunity to provide feedback on the initial recommendations before final recommendations are provided to the Committee.

***Phase 6 – Consideration and recommendation prepared for the Committee***

24. The Provost and VPFS will meet to review the internal working group's final recommendations and the Provost and VPFS will make their recommendations to the Committee. It is anticipated that completion of the Process will take no less than six months, however there is a significant amount of consultation that has potential to cause delay.

Indicators for Academic Staff Designation

25. It is difficult to outline an exhaustive list of indicators to consider in evaluating whether an employee is an academic. The scope of the academy and academic mandate varies significantly between institutions and historical decisions have led to a number of positions being designated that may not necessarily be academic. In listing possible indicators to consider, there is no intent to create a strict or comprehensive definition of academic staff or academic work and indicators will be considered within the context of the specific MaPS position and academic mandate of the university.
26. The extent to which MaPS perform the following tasks and responsibilities as part of their regularly assigned duties will inform the designation recommendation:
  - independently conducting or directing research;
  - the creation of research papers or other scholarly publications;
  - the dissemination of the results of research by means appropriate to the discipline;
  - influencing research topics and allocation of research grants;
  - teaching and assessing students, as well as the supervision of graduate students; and
  - producing materials or providing curriculum direction on credit courses.
27. An individual or a category of MaPS who perform these indicators but not as a significant percentage of their primary tasks will not be considered academic staff.

Internal Working Group

28. The proposed members of the internal working group will include representatives from the following university business units:
  - Academic SLT;
  - Academic Relations;

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- Employee and Labour Relations;
- Compensation (classification);
- Associate Vice-President HR; and
- Legal Services.