**Designation Business Case Form**

|  |  |
| --- | --- |
| Date of Submission | Click or tap to enter a date. |
| Bargaining Unit/University | Choose an item. |
| Bargaining Unit Agent/Executive Officer (Name) | Click or tap here to enter text. |
| Bargaining Unit Agent/Executive Officer (Position) | Click or tap here to enter text. |
|  |  |
| Is this a Designation or an Except from Designation Business Case Submission | Choose an item. |
| Is the position noted as an exempted position in the Designation as Academic Policy | Choose an item. |
| If yes, the position or category of positions is NOT deemed an Academic. Proceed with completing the Designation Business Case Form. | **Proceed to Position Title** |
| If no, please proceed with completing the Designation Business Case Form | **Proceed to Position Title** |
|  |  |
| Position Title | Click or tap here to enter text. |
| # of Positions  | Choose an item. |
| # of Encumbered | Choose an item. |
| Encumbered Position Number(s) | Click or tap here to enter text. |
| # of Vacant | Choose an item. |
| Vacant Position Number(s) | Click or tap here to enter text. |
| Department/Faculty | Click or tap here to enter text. |
| Position Bargaining Unit/Excluded | Choose an item. |

**JUSTIFICATION FOR DESIGNATION**: To be completed by the Bargaining Unit Agent or Executive Officer as applicable.

The Designation Business Case must be fully supported and evidenced by completing the following:

1. Describe the position for which Designation is proposed, include:

 Brief outline of responsibilities (Attach Position Description, Specialized/Specific Responsibilities and Organization Chart)

Click or tap here to enter text.

2. How does the objective criteria (listed below) in the Designation as Academic Policy apply to this position(s)?

 Research and Scholarship, Teaching and Learning, Service to the University and Society, Terminal Credential(s)

Click or tap here to enter text.

3. Does this position engage in managerial responsibilities and is at risk for a real, potential, or perceived conflict of interest? If yes, please provide specific details below and the significance of any such conflict.

Click or tap here to enter text.

4. Does this position participate in the development of, or have regular access to information supporting the University management in its negotiation of collective agreements and the application and administration of the agreements and is at risk for a real, potential, or perceived conflict of interest? If yes, please provide specific details below.

Click or tap here to enter text.

5. Provide details of the following as they pertain to the employee or group of employees (if applicable).

1. History of collective bargaining with the University;
2. The nature of the functional relationship (if any) between the subject employee(s) and AU Academics (community of interest);
3. Presence of any conflicting goals in collective bargaining;
4. Impact on the employee or category of employees.

Click or tap here to enter text.

6. Additional relevant information to support the Designation Business Case.

Click or tap here to enter text.

7. Supporting Document Summary – Provide a list of supporting documents for consideration, if applicable and attach.

Click or tap here to enter text.

**SIGNATURES**

**Bargaining Unit Agent/Executive Officer**

I submit the above Designation Business Case for review, consultation (as required), and approval.

Bargaining Unit Agent/Executive Officer (name) Click or tap here to enter text.

Date: Click or tap to enter a date.



**CHRO**

Human Resources has reviewed and consulted (where appropriate) and submits the Designation Business Case and all relevant documentation for review and consideration to the Executive Team.

Chief Human Resources Officer (or Designate): Click or tap here to enter text.

Date: Click or tap to enter a date.

**Executive Team**

Executive Team has been given the opportunity to review, discuss and submits the Designation Business Case to the Board Human Resources and Compensation Committee (HRCC) for review, consideration and approval.

Executive Team Representative: Click or tap here to enter text.

Date: Click or tap to enter a date.

**HRCC**

The above Designation Business Case was reviewed, considered and is approved/denied as outlined.

HRCC committee representative:Click or tap here to enter text.

Date: Click or tap to enter a date.

HRCC Decision: Choose an item.

