Abolition of Position:
Process Guide on Management of Priority Placement and Transition
Version 3.0
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Introduction

This guide addresses how the process works when a position abolition is approved and the priority placement process is initiated. The guide provides general information necessary to understand how the process will occur as well as provides guidance with respect to considerations that may be required when managing this process. This Guide applies to all support/administrative position abolitions whether they are governed by a negotiated collective agreement or by University policy.

What is an abolition of position?

An abolition of position occurs when the University approves the modification of its allocation of financial and human resources after consideration of priorities, evolution and budgetary constraints. This abolition is called an "administrative reason" and refers to any structural reorganization, financial limitation or other reason (excluding termination for cause) that results in the elimination of existing support staff positions at the University of Ottawa.

Why would a position be abolished?

A position would be abolished as a result of an administrative, structural reorganization, financial limitation or other reason (excluding termination for cause).

Supportive mechanisms available to assist during the process.

For Manager:
- Employee Family Assistance Program
- Collective Agreements (Sections)
- Policy 2C: Termination of Employment
- Process Mapping

For Employee:
- Employee Family Assistance Program
- LLOD (Phase III of Program)
- Collective Agreements (Sections) – if applicable
- Policy 2C: Termination of Employment
PHASE I: IDENTIFICATION AND APPROVAL OF POSITION ABOLITION AND EMPLOYEE IMPACT

PLEASE NOTE

- Initial Phase
- Approval mandatory before Phase II commences
- Initiative led by Director/CAO with HR business partner support and consultation to ensure approval recommendation and action plan addresses all necessary elements.

PROCESS PARTICIPANTS

IS: Immediate Supervisor/Manager. Includes CAO/Director.

PARH: HR Business Partner or HR Manager

LR/H&W: Centre of Expertise representatives from Labour Relations and Health and Wellness areas (HUB participants, definition provided below)

HR Operations: Areas associated with the provision of HR services (e.g., Recruitment, Pay, Benefits, and Pension).

PROCESS STEPS

Should a need exist for a regular position to be abolished, the applicable CAO/Director of the Faculty or Service (hereinafter, the Director) should have a discussion with their Human Resources Business Partner for the purposes of ensuring that the decision is in line with University policy, collective agreement interpretations (if applicable) and any other governance Items.

The HR Business Partner will provide guidance with respect to understanding and documenting the rationale of the decision and what possible impacts may occur as a result of the decision. The HR Business Partner will assist the CAO/Director with developing a recommendation that will focus on planning for any impacts that this decision will create (e.g., work reassignment, employee communication, or employee displacement).

The HR Business Partner will ensure that the recommendation that is developed with the CAO/Director identifies any potential risks that will need to be managed. The HR Business Partner provides a one point of contact service for the Faculty/Service to ensure that the recommendation is thoroughly reviewed, assessed and developed in such a manner so that the Faculty/Service has identified the necessary details to move forward for approval purposes. In addition, the HR Business Partner will act as the liaison with internal Human Resource Centers of Expertise (COE) to ensure that there is a full understanding of the initiative and that any extenuating circumstances that may exist are planned appropriately.
As part of the recommendation development, the HR Business Partner will ask the Faculty/Service to review and provide detailed information that will need to be assessed at the time of approval consideration. Examples of the level of information that will be required include (but are not limited to):

- Identification of the position to be abolished
- Date of abolishment
- Whether there are any special requirements that will need to be managed (e.g., moving employee out of the area during the priority period)
- Potential impact upon remaining team and plan to manage such impact
- Analysis of any potential risks to be managed
- Financial costs related to any severance or retirement decisions

While the HR Business Partner will support the Faculty/Service with the development of the plan, it will remain the responsibility of the respective Faculty/Service to forward the completed recommendation to their Sector VP and AVP, Human Resources for final approval.

If the recommendation is approved, the process will move into Phase II.

**PHASE II: MANAGEMENT OF PRIORITY PLACEMENT**

**PLEASE NOTE**

- Commences upon approval of abolition recommendation.
- Process can overlap between Phase II and III, or it could be consecutive (situational dependency).
- Certain specifics contained via CBA/Policy. PARH to provide advice on specific details, timelines, etc., as part of consultation.
- PARH acts as Project Manager with support through the "HUB" (see definition in the next section) for detailed information.
- PARH determines when Centres of Expertise (COE) need to be consulted, involved or informed.
- PARH liaises with impacted Supervisor/Manager and "HUB" to ensure effective process, communication and identification, resolution of Faculty/Service concerns.
- Process can be disrupted and put on hold if affected employee is absent due to approved medical or legislated leave (e.g., Maternity/Parental)
PROCESS PARTICIPANTS

IS: Immediate Supervisor/Manager. Can include CAO/Director.

PARH: HR Business Partner or HR Manager

Hub Concept: Centre of Expertise representatives from various areas within HR that will support PARH. Includes Labour Relations, Health and Wellness, LLOD and Recruiting.

HR Operations: Areas associated with the provision of HR services (e.g., Recruitment, Pay, Benefits, and Pension).

LLOD: Leadership, Learning and Organizational Development (LLOD)

PROCESS STEPS

APPROVAL OF RECOMMENDATION

Upon notification of the approval of the abolition recommendation, the Faculty/Service and HR Business Partner should meet for the purposes of commencing the abolition process.

CHANGE MANAGEMENT PLAN

The HR Business Partner will work with the Faculty/Service to confirm the identity of the impacted individuals and to start the development of a documented Change Management Plan. The Change Management Plan is a critical part of the process and a thorough plan ensures that there is a documented approach for the process, potential impacts, and outlines the critical steps that will be necessary to follow throughout the process. In the case of several positions being abolished, there can be one overall plan or several plans based upon the specifics of the situation. The HR Business Partner can provide guidance with respect to how the plan should be structured and whether consolidated or individualized plans would be the best avenue given the situation specifics (e.g., different unions, special situations, accommodation issues, etc.).

Once the recommendation is received, the HR Business Partner will consult with the Human Resources Centers of Expertise (COE) to provide, request and obtain additional information that should be considered during the development of the Change Management Plan. They will continue to keep their colleagues in Human Resources informed during the process and will act as a liaison between the Faculty/Service and Human Resources. If the HR Business Partner feels that a situation presents itself which warrants additional support, they will request that support directly from the HR Centre of Expertise (e.g., Health and Wellness, Labour Relations, etc.).

As part of the ongoing communications between the HR Business Partner and the various Centres of Expertise, there is an HR concept called "HUB". The "HUB" concept is a structured information network that is managed by the HR Business Partner. Members of the HUB include a dedicated representative from each specialized area of Human Resources (e.g., Talent Acquisition, Health and Wellness, Labour Relations, LLOD, etc.). Due to this approach, the Faculty/Service will receive consistent advice on issues and have a dedicated group of experts that will be kept informed and available to support the situation upon the request of the HR Business Partner.
NOTIFICATION PROCESS

Once the Change Management Plan is completed, the next step is to advise those individuals and/or groups that should be aware of the decision. The Change Management Plan should have identified the individuals and/or groups that are to be notified and how such notification will occur. If the position to be abolished is a unionized position, there will need to be a preliminary meeting to formally advise the Union prior to any notice to the impacted employee.

Whether the recommendation involves a unionized or non-unionized position abolition, the HR Business Partner will guide the Faculty/Service with respect to the appropriate policy or collective agreement that will need to be reviewed to ensure that all proper steps are being followed.

Once the initial notification has been completed, the Faculty/Service, supported by the HR Business Partner, will meet with the impacted individual to formally advise them of the position abolishment and outline how the priority placement process will be managed. During the meeting, it is not uncommon for the employee to request representation from either a union/non-union association representative. This representation should be encouraged as it will often provide additional support to the employee at the time of notification.

INTRODUCTION TO PHASE III: TRANSITION PROCESS

After the initial notification meeting, the HR Business Partner will arrange a secondary meeting with the employee. This meeting is to follow up to ensure that the employee has an opportunity to seek additional clarification, answer questions that the employee may have, and to provide additional explanation with respect to how the priority placement will work as well as any impact and accountabilities that the employee will have during the process. At that time, the employee will be asked if they would like to be referred to LLOD for participation in Phase III: Transition Phase. That Phase III: Transition Phase is voluntary and the employee can elect not to participate if they choose to pursue alternative avenues (e.g., Retirement).

If the employee wishes to participate in Phase III: Transition Phase, they will be referred over to the LLOD area by the HR Business Partner and asked to meet with the employee for an initial meeting. An expert from LLOD will meet with the employee to brief them on what is included in the Transition Phase, commence the development of an employee profile and start the process of the transition.

INITIATION OF CHANGE MANAGEMENT PLAN

After meeting with the impacted employee, the Faculty/Service will then initiate the steps that were identified in the Change Management Plan that was completed in Phase I. Steps that could be included in the Plan that would be initiated during this time would include:

- Advising remaining team of the position abolition
- Inclusion of additional details to help the team understand
- Reassignment of tasks, if applicable
- How they can support the individual (if they remain in the environment)
- Future impacts associated with the position abolition
- Ensuring that the team has the ability to ask questions and express their thoughts (either privately or as part of the team meeting).
MOVING FORWARD

The timelines associated with the priority placement may vary for several reasons. An individual may elect not to continue with the process and ask to leave their employment (e.g., retirement, other opportunity external to the University). Throughout the process, the HR Business Partner and Faculty/Service work together to ensure ongoing consultative updates are provided.

At the point in time when the process is completed, the Faculty/Service is responsible to ensure that they complete all documentation needed to facilitate the end of the individual’s employment within their team. This documentation could vary based upon the rationale for departure and the HR Business Partner can provide guidance to ensure that they send in timely, complete and accurate approved forms to HR Operations for processing (e.g., pay - SPAF, etc.)

PHASE III: TRANSITION PROCESS – SUPPORTING IMPACTED INDIVIDUAL AND PLACEMENT IN NEW POSITION OR DEPARTURE

PLEASE NOTE

- Process can overlap between Phase II and III, or it could be consecutive (situational dependency).
- Employee involvement and accountability critical part of Phase III. Not all cases will require Phase III (e.g., employee elects to depart the University or take retirement rather than request alternative employment).
- PARH retains overall project management responsibility for review and assessment of reasonable offers.
- Under guidance of PARH to “HUB”, LLOD supports employee to prepare for potential avenues for consideration as well as competence development.

PROCESS PARTICIPANTS

Hub Concept: Centre of Expertise representatives from various areas within HR that will support PARH. Includes Labour Relations, Health and Wellness, LLOD and Recruiting.

Hiring Manager: Manager/Supervisor who is hiring for a position that has been identified as "reasonable offer". Can include CAO.

PARH: HR Business Partner or HR Manager.

HR Operations: Areas associated with the provision of HR services (e.g., Recruitment, Pay, Benefits, and Pension).

Employee: Impacted Individual

LLOD: Organizational Development and competence Building (HUB participant)
PROCESS STEPS

During Phase III: Transition Process, there are two different processes that work in parallel. During this time, the HR Business Partner, in consultation with the “HUB” approach will be exploring opportunities to place the individual into another comparable position, if one can be identified. While this is ongoing, the employee may be working with LLOD as part of a voluntary transition process designed to assist the employee with the establishment and creation of a specific development plan.

IDENTIFICATION OF COMPARABLE POSITIONS FOR REVIEW

During this phase, the HR Business Partner will work with the HR Centers of Expertise to identify potential vacancy opportunities that may be considered as a viable comparable position for the impacted employee. Upon receipt of a potential vacancy from the Talent Acquisition team, the HR Business Partner will review to determine acceptability.

Once the HR Business Partner deems that the position would be acceptable, they will hold an exploratory meeting with the CAO and Hiring Manager. During that meeting, they would evaluate the compatibility between the position and the impacted individual who is in the priority placement process.

If there is potential for a match, the Hiring Manager will conduct an interview process with the impacted employee. Based upon the interview and match potential, there may be placement particulars included that would be designed to give an individual the opportunity to prove themselves in the position. With the HR Business Partner’s support, the Hiring Manager will confirm the placement particulars (e.g., full placement, trial period, temporary assignment, etc.).

If there is no reasonable offer available for the employee, the HR Business Partner will explore any other opportunities that may be available to the impacted employee (e.g., bumping opportunities in a unionized setting).

At all times during this process, the HR Business Partner works with the "HUB" to ensure full communication between Human Resources, Hiring Manager and former Faculty/Service.

REASONABLE OFFER PROCESS

If, after a reasonable offer has been identified, the Hiring Manager advises that the impacted individual is not accepted, they will be required to provide a written justification to the HR Business Partner that outlines the rationale for their decision. The HR Business Partner will review the justification to ensure that the rationale for declining is appropriate and due process has been followed.

If the justification is reasonable and the position is not comparable, the HR Business Partner will consult within the HR "HUB" to identify if the employee profile or job descriptions need to be updated to ensure an effective review of potential comparable positions.

During this period of time, the HR Business Partner keeps the impacted employee informed when a potential comparable vacancy has been identified and the outcome of any discussions of their candidature.

If a comparable vacancy has been identified and the employee refuses to consider the position, the HR Business Partner will meet with the employee to understand the rationale. The role of the University is to provide an
opportunity for the employee, not to ensure placement into a desired position. If the HR Business Partner determines that the employee has refused the comparable opportunity, there will be no further activities to facilitate placement and the process will be deemed as completed.

EMPLOYEE ACCOUNTABILITIES DURING TRANSITION PHASE

During the transition process, the employee will be expected to meet with the HR Business Partner for the purpose of following up on potential opportunities.

If the employee has asked to participate with LLOD for the transition process, they agree to work jointly with their LLOD representative and to take such actions that are identified as part of their development plan. Such actions that the employee would be responsible to complete can include:

- Writing/updating their resume
- Participating in available training courses that are recommended (either on-line or through LLOD sessions)
- Meeting with LLOD to ensure that they have details necessary to develop an Employee Competency Profile
- Keeps their LLOD Representative updated with respect to their accomplishments
- Provides feedback to their LLOD Representative with respect to concerns and development challenges that they may be experiencing through the process.

LLOD SUPPORT DURING TRANSITION PHASE

During the transition process, a representative from HR’s LLOD team will be assigned for the purpose of working with an employee to develop their Employee Competency Profile and offering assistance with the writing of the resume, support in developing interviewing techniques and the creation of a development plan.

The employee will retain accountability to execute their development plan and provide feedback; however, the LLOD Representative will be available to support them throughout this process and ensure that the activities that the impacted individual is undertaking to support them during this process are communicated back to the HR Business Partner through the “HUB” approach.

WHEN TRANSITION ENDS

The transition process ends when the impacted individual is placed into a comparable position, refuses such placement into a comparable position, or leaves their employment with the University (e.g., resignation, retirement or other reason).