

Choosing and Costing Research Support Personnel

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UNBC Human Resource Department

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Purpose

This document is provided to assist UNBC researchers in determining the level/type and cost of appropriate personnel as well as outlining the steps to be taken in implementing this selection once proposal funding has been secured. In addition to factoring in overhead and other costs, it is important that research proposals accurately reflect the cost of support personnel.

What Category of Support Personnel?

In crafting the research proposal, consideration will need to be given to the type of personnel needed to support the researcher in execution and completion of the proposed research. While ultimately the employment category may need to be modified in response to the ability to attract and retain the level and type of personnel planned for, it is recommended that researchers start with the premise that they will be able to employ the category of personnel requested.

Given the range of research being undertaken at UNBC, it is not surprising that there exists a variety of support personnel categories working within the University. These include:

- Post-Doctoral Fellows
- Research Managers
- Research Associates
- Research Assistants

The University also supports and promotes the employment of students to fulfill its academic mandate and vision and to support enrollment efforts. Student employees may act as Research Assistants while enrolled at UNBC and for up to two months following graduation.

Definitions of the above categories of support personnel are attached in “Schedule A”.

This document provides position descriptions that outline, in general terms, the duties of support personnel, the level of education and experience required to perform in the role and meet any additional expectations the researcher may have in terms of supporting the research project.

For additional assistance in determining the appropriate level for the type of research project being undertaken, Faculty are encouraged to consult with their Departmental Chair, the Office of Research and/or the Human Resources Department.

What Level of Compensation?

The category of support personnel required will directly influence the level of compensation to be budgeted. In general, the rates for Post-Doctoral Fellows, Research Managers and Research Associates are market determined, rates for Research Assistants are set by reference to the CUPE collective agreement, and rates for students

are generally set in relation to whether they are in undergraduate or graduate programs. Further details on compensation levels can be found in the attached "Schedule B".

While some flexibility exists for other groups, it is important to note that positions covered by the UNBC CUPE Collective Agreement are expressed as full or part "Full Time Equivalents" based on a 35 hour work week. Furthermore, salaries are expressed as an annual amount with the proviso that they will be prorated for term length and full-time equivalency.

Note that while it may be difficult to project the actual amount of support personnel "work time" required, a calculation of total labour cost will not be possible without this estimation. In this regard, consultation with Colleagues, Departmental Chairs and/or the Office of Research may prove helpful.

What About Benefit and Vacation Costs?

When budgeting for the cost of support personnel, consideration should be given not only to the amount of "work time" required and the hourly or annual salary, but also to costs associated with employer statutory contributions and employee benefits, where applicable.

The cost of employer statutory deductions (Canada Pension Plan, Employment Insurance and Workers Compensation) is 7.722% as of January 1, 2011. This amount needs to be added to the budget to determine the total labour cost but it is not included in the rate offered to the employee.

Vacation pay is included in the rate paid to the employee and will show as 4% separated out on their pay stub (where 4% equals a two week entitlement). This 4% needs to be included in the labour cost budget but is not included in the rate offered to the employee. Note that 6% should be used for all CUPE positions and may also be used for other non-student positions where funding proposals permit and when required by Employment Standards.

Benefits will vary with the personnel category, whether the person will be working full or part-time, and the anticipated term of employment. These benefit amounts need to be added to the budget to estimate total labour cost but are not included in the rate offered to employees. Details of what benefits are provided, and how to calculate the associated costs, is included in the attached "Schedule C".

Note that while students do not receive benefits (hence no benefit cost) the 7.722% cost of statutory deductions needs to be budgeted as does the 4% for vacation pay (total of 11.722%). Additionally, where Faculty are planning to hire on an hourly basis rather than a salaried basis, a further 4.20% needs to be added for statutory holiday pay for a total cost of 15.922%.

How to Hire?

Once the research proposal has been approved, the researcher may begin the process of hiring support personnel. The first step that should be taken, if not already completed, is to review with Human Resources the category of support personnel being sought. In this regard, it is very helpful to have drafted a rough position description.

Except for hiring a student, once the employment category has been finalized the researcher completes, an “Employee Request Form”. For student hiring, a “student contract form” (also referred to as the “blue form”) will need to be completed. These forms are available in HR or on line at:

<http://www.unbc.ca/assets/hr/forms/recruitment/>

Researchers are free to undertake their own recruitment efforts when filling Post-Doctoral Fellowship, Research Manger, Research Associate or Student Employee positions. Human Resources if available to assist if requested.

However, because Research Assistant positions are covered by the terms of the UNBC/CUPE (Local 3799) Collective Agreement, it is important that researchers follow the posting and selection criteria set out in the Agreement (eg. post for five days, have a CUPE member on the selection committee, complete a Position Description Questionnaire where applicable, etc.). The UNBC/CUPE Collective Agreement is on line at <http://www.unbc.ca/hr/> and Human Resources is available to assist with the process.

As an aside, when putting together the budget for a research proposal, consideration should be given to the inclusion of advertising costs where external recruitment is being contemplated. While Human Resources can assist with the formatting and distribution of advertisements, the costs will be billed back to the Faculty member.

Once Hired – the Probationary Period

An initial probationary or assessment period is applicable to all research support personnel. Generally this period will be three months in length (for CUPE positions see the relevant collective agreement language at <http://www.unbc.ca/hr/>). The purpose of the probationary period is to allow the employee to demonstrate their suitability for the role and for the employee to assess their interest in the assignment. Supervisors are encouraged to discuss performance with new employees on a regular basis during this period and record these discussions.

Contact Information

Human Resources	960-5521
Research Office	960-5820
Finance	960-5616
Purchasing	960-6477

Schedule A

Support Personnel Definitions

Post Doctoral Fellow:

- the appointee was recently (within five years) awarded a PhD or the equivalent;
- the appointment is temporary;
- the appointment involves substantial research or scholarship;
- the appointment is viewed as preparatory for a full-time academic and/or research career;
- the appointee works under the supervision of a faculty mentor in the University or one of its affiliated institutes;
- the appointee has the freedom, and is expected, to publish the results of research or scholarship during the period of the appointment

Research Manager:

- the appointment may be either temporary or ongoing, depending on the security of funding to support the position and the ongoing need for research management services
- the appointment may be funded by research grants, contracts, endowment funds, university operating funds or other funds
- the appointee may work under the supervision of a faculty member or of a university administrator
- the appointee is required, as a normal part of their work responsibility, to supervise, hire, terminate, discipline, and otherwise manage research or research-related personnel
- the appointee is required, as a normal part of their work responsibility, to manage funds and will be held accountable for their appropriate expenditure
- the appointee may be required to provide reports on personnel and financial matters for internal and/or external audiences
- the appointee may be expected to conduct research as well as to manage research activity
- the appointee has the freedom to publish the results of research or scholarship during the period of the appointment

Research Associate:

- appointed to high level, term specific, research activities
- generally hold a PhD or Masters degree
- the appointment is funded by research grants, contracts, endowment funds or other funds that are not part of the normal operating budget of the university
- carry out research projects either as primary or co-investigators under the direction of the Grant/Fund holder

- set research objectives and, either independently or at the direction of the Grant/Fund holder, develop experiments, research methods and protocol
- may design and develop instrumentation and equipment for research projects
- co-author or independently publish research results and participate in analysis and presentation of research results as part of their term

Research Assistant:

Note that non-student research assistants are CUPE positions. A full-time position is based on a 35 hour work week.

Level 1

- two/three year certificate with six months to one year experience
- examples may include basic data gathering/entry (in a lab, the field or other), literature searches or the collation of survey results. Techniques and methods used are relatively simple in nature.

Level 2

- undergrad with more than one year but less than two years experience
- examples may include data gathering and preliminary analysis of raw data (in a lab, the field or other), literature reviews and summations or the administration of various survey tools. While tasks may be complex, detailed instruction is provided when they are assigned.

Level 3

- graduate degree with more than two years but less than three years experience
- examples may include data gathering, analysis and summation (in a lab, the field or other), input into the selection of experiment techniques, or input into the development of various survey tools. Completion of tasks may require specialized knowledge and/or experience

Student Employee – Research Assistant

- funded by research grants, contracts, endowment funds or other funds that are not part of the normal operating budget of the university
- assist Faculty in a wide variety of research related activities that are usually associated with their academic experience and focus
- may remain within this type for up to two months following termination of student relationship

Schedule B Compensation Levels

The following compensation information is provided primarily to assist researchers in developing their research proposal budgets.

The levels noted are meant as examples only and will vary depending upon such factors as market forces, collective agreement coverage and the budgetary limits available. Researchers are encouraged to consult with Human Resources prior to entering into discussions with potential support personnel.

Post-Doctoral Fellow

- salary is market / specialty determined
- if in doubt please contact HR, the Dean or the Research Office to review rates

Research Manager

- salary is market / specialty determined
- if in doubt please contact HR or the Research Office to review rates

Research Associate

- salary is market / specialty determined
- if in doubt please contact HR, the Dean or Research Office to review rates

Research Assistant

The following rates are specific to the three categories described in "Schedule A". Specific duties and/or qualifications may result in job evaluation ratings outside these rates. Please contact Human Resources to review rates.

- Level 1 \$32,268.13 – 33,266.11 (\$17.73 – 18.28) (CUPE Grade 2 as of July 1, 2009)
- Level 2 \$40,749.11 – 42,009.39 (\$22.39 – 23.08) (CUPE Grade 5 as of July 1, 2009)
- Level 3 \$52,057.09 – 53,667.10 (\$28.60 – 29.49) (CUPE Grade 9 as of July 1, 2009)

Salaries are expressed as an annual amount with the proviso that they will be prorated for term length and full-time equivalency (where full-time is 35 hours per week).

Student Employee

- ranges from \$8.50 to \$14.50 (or higher dependent on funding availability for rates above minimum wage of \$8.50)
- recommend hourly payment but may put on a part-time salary
- generally higher rates are paid to Graduate Students
- if in doubt please contact HR, Dean, or Research Office to review rates

Schedule C

Benefits – Entitlement and Costing

Following is a summary of the benefits available to non-student research support personnel as well as a costing worksheet to help determine actual costs. Benefit plan details are available in Human Resources. Note that student employees do not receive non-statutory benefits (ie. fringe benefits).

Using the Costing Guide and Costing Worksheet:

- Step #1 Refer to the Costing Guide on the next page, and using the contract term, determine which benefit package(s) the employee is eligible for. They may be able to choose PKG A or B, depending on their family status. Additionally, some employees may be eligible for MSP coverage, in which case they may choose PKG C, D or E depending on their family status (single/couple/family). As some research personnel may already have MSP coverage through family, spouse, etc., they would not need it while employed at UNBC. For costing purposes, it is prudent to select the family package if the employee family status is unknown.
- Step #2 Using the applicable benefit package(s) from the Costing Guide, fill in the blanks on the Costing Worksheet (attached below). The Worksheet has 2 options; term less than 2 years or term equal to or greater than 2 years. Only complete the section of the Worksheet that applies to the contract you are offering.
- Step #3 Use the resulting “Total Budget Required” to complete the labour cost section of any research proposals. Note that “Total Budget” will need to be prorated based on the specific term length and/or hours per month required.

Costing Guide for Non-Student Research Support Personnel (as of January 1, 2011)

NOTE: Please be sure you are using the most current Costing Guide and Worksheet as highlighted rates tend to change annually In January and July. Refer to the HR web page for the most current Guide and Worksheet.

If the family status of the employee is unknown (i.e. single/couple/family), then the family plan should be selected for costing purposes.

Contract Term	Fringe Benefits % (ADD/LIF/PEN)	% Cost	Fringe Benefits \$ (DEN/EAP/EHC/VIS)	PKG A	PKG B	MSP	PKG C	PKG D	PKG E
				Annual Cost Single Plan	Annual Cost Family Plan		Annual Cost Single Plan	Annual Cost Couple Plan	Annual Cost Family Plan
TERM < 2months	Not eligible	0.0000%	Not eligible	0.00	0.00	Not Eligible	0.00	0.00	0.00
TERM 2months - 6 months	Not eligible	0.0000%	Employee Assistance Plan	66.48	66.48	Medical Services Plan	726.00	1,308.00	1,452.00
TERM 6 months <1 year	Not eligible	0.0000%	Employee Assistance Plan	66.48	66.48	Medical Services Plan	726.00	1,308.00	1,452.00
			Extended Health	459.12	880.08				
			Vision	144.48	294.96				
			Total	670.08	1,241.52				
TERM 1 year <2 years	Accidental Death/Dismemberment Ins	0.0408%	Dental	534.72	1,210.80	Medical Services Plan	726.00	1,308.00	1,452.00
	Life Insurance	0.5784%	Employee Assistance Plan	66.48	66.48				
	Total	0.6192%	Extended Health	459.12	880.08				
			Vision	144.48	294.96				
			Total	1,204.80	2,452.32				
TERM =>2 years	Accidental Death/Dismemberment Ins	0.0408%	Dental	534.72	1,210.80	Medical Services Plan	726.00	1,308.00	1,452.00
	Life Insurance	0.5784%	Employee Assistance Plan	66.48	66.48				
	Pension	8.0000%	Extended Health	459.12	880.08				
	Total	8.6192%	Vision	144.48	294.96				
			Total	1,204.80	2,452.32				

Costing Worksheet (as of January 1, 2011)

Complete either calculation (A) or (B) as appropriate for contract term and prorate the “total budget” as required for less than full-year or less than full-time contracts.

A) Annual Cost Calculation for Contracts of < 2 Years

1) Annual Salary		_____
2) Vacation Pay	(Line 1 x 4%*)	_____
3) Total Remuneration	(Line 1 + 2)	_____
4) Statutory Benefits	Line 3 x 7.722%	_____
5) Fringe Benefits (%)	(Line 3 x 0.6192%)	_____
6) Fringe Benefits (\$)	(Select PKG A or B**)	_____
7) MSP (\$)	(Select PKG C, D or E**)	_____
8) Total Benefit Cost	(Line 4 + 5 + 6 + 7)	_____
Total Budget Required	(Line 3 + 8)	=====

*Note: use 6% for CUPE positions or if you are planning on offering three weeks leave to other non-student employees.
 **If the family status of the employee is unknown, then the family plan should be chosen.

B) Annual Cost Calculation for Contract of => 2 Years

1) Annual Salary		_____
2) Vacation Pay	(Line 1 x 4%*)	_____
3) Total Remuneration	(Line 1 + 2)	_____
4) Statutory Benefits	(Line 3 x 7.722%)	_____
5) Fringe Benefits (%)	(Line 3 x 8.6192%)	_____
6) Fringe Benefits (\$)	(Select PKG A or B)	_____
7) MSP	(Select PKG C, D or E)	_____
8) Total Benefit Cost	(Line 4 + 5 + 6 + 7)	_____
Total Budget Required	(Line 3 + 8)	=====

*Note: use 6% for CUPE positions or if you are planning on offering three weeks leave to other non-student employees.
 **If the family status of the employee is unknown, then the family plan should be chosen.