



STANDARD WORKLOAD FORM GUIDELINES

Conestoga College

2018 – 2019

Developed by Local 237 & Conestoga College – UCC

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Standard Workload Form Guidelines

Introduction

This Reference guide has been created to assist Chairs, Faculty members, Deans, and other employees at Conestoga College in the completion of the Standard Workload Form.

If you have any specific questions, please contact Shelley Schenk, Director of Human Resources (HR), at extension 3333, or Mitko Mancevski, OPSEU Local 237 Chief Steward, at extension 3428.

Guidelines for Faculty, Chairs, Deans, and Staff

The provisions of articles 11.01 and 11.02 of the Collective Agreement are to be followed in developing workload assignments for all full-time professors and instructors (faculty members). These guidelines provide a reference for everyone involved and document Conestoga's agreed to interpretation of the provisions. Preparation of Standard Workload Forms (SWFs) is required for all probationary and regular full-time faculty members who are teaching or assigned specific work in lieu of teaching during a defined period of time.

A SWF will not be prepared for full-time faculty members on leaves of absence (sick leave, parental leave etc.), professional development leave, or internal administrative assignments and secondments. In cases where a faculty member is away on leave, HR will inform the Chief Steward at the beginning of the semester that there will be no SWF issued.

Assignments during Non-Teaching Periods

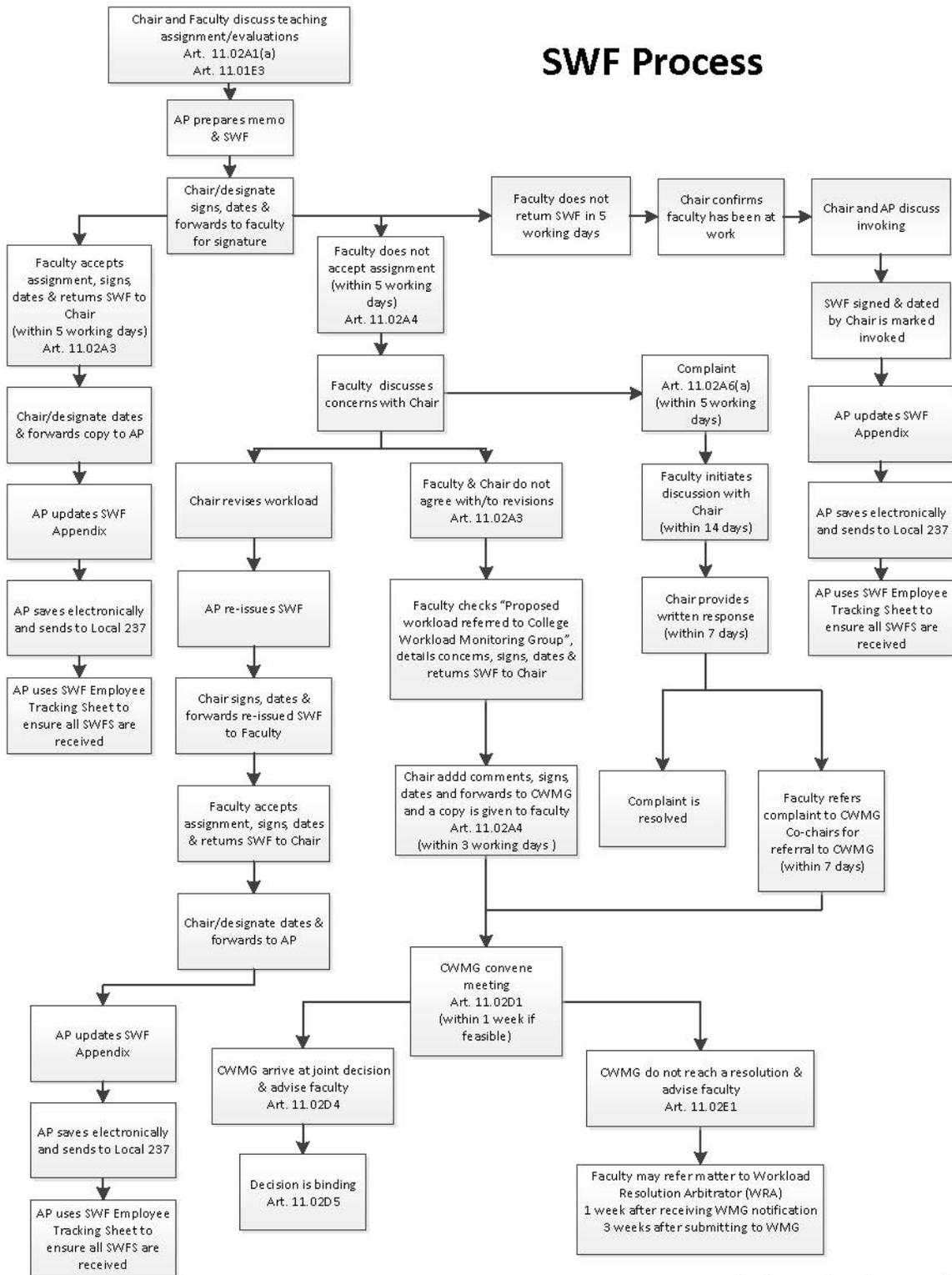
The Collective Agreement provides for an article dealing with the non-teaching period. Article 11.08 reads as follows:

"In keeping with the professional responsibility of the professor, non-teaching periods are used for activities initiated by the professor and by the College as part of the parties' mutual commitment to professionalism, the quality of education and professional development. Such activities will be undertaken by mutual consent and agreement will not be unreasonably withheld."

A Standard Workload Form (SWF) is not required during non-teaching periods unless the College wishes to assign specific work.

Standard Workload Form Process

SWF Process



Days = Calendar Days unless otherwise noted
AP = Academic Planning

Preparation of SWFs and Timelines

Prior to the establishment of a total workload the faculty member and supervisor shall discuss (in person or by email) the workload (11.02 A1 (a)). A SWF or a Modified Workload Arrangement (MWA) will then be completed for each defined teaching period.

Each faculty member is to be provided with a signed and dated copy of their SWF **not later than 6 weeks** prior to the beginning of the SWF period covered by the timetable excluding holidays and vacations. (11.02 A1 (a))

Each faculty member is expected to sign, date, check the appropriate box (see SWF – Sample and Explanation section L), make a copy for themselves, and return the SWF **within 5 working days** of receiving it from the supervisor.

If the SWF is not signed and returned **within 5 working days after receipt**, the supervisor deems the SWF to have been accepted. (Article 11.02 A4) A note should be made in the Supervisor’s Comment area (see SWF – Sample and Explanation section H) indicating the SWF was not signed **within 5 working days** and it has been deemed accepted. SWFs deemed accepted will be referred to as Invoked.

All signed or deemed accepted SWFs shall be forwarded **within 3 working days** of receipt to the Faculty Union Office. The steps for submitting SWFs are as follows:

- a) Following the completion of the SWF, either by signature of faculty member or by the elapsing of the 5 day waiting period, each faculty member’s SWF (s) should be scanned and saved, noting the surname, given name, and semester (e.g., “Smith, John –W2019”). This work may be performed by Support Staff employees.
- b) Where a faculty member has multiple SWFs within a given semester, those SWFs may be scanned and saved as one document. There must be one unique file for each faculty member, i.e., multiple faculty members’ SWFs should not be saved together in one document.
- c) The Academic Planner/Scheduling Office or supervisor/designate prepares an email with the SWFs for faculty member attached and sends to the Faculty Union Office, with the subject line “Faculty SWF Submission – W2019” or MWA W2019 (or the applicable semester). In the body of the email, please list the names of the faculty members whose SWFs are attached.
- d) Where a revised SWF is issued, the same process as above is to be followed, indicating the revised status in the title of the document (e.g., “Smith, John – W2019 – Date Revised”).
- e) Where a Workload is disputed, faculty member must sign, date, and check off the second box “Proposed workload referred to college workload monitoring group” (see SWF - Sample and Explanation section L). (Article 11.02 A4) For further information refer to Workload Monitoring Group (WVG) Steps.

General SWF Information

Overtime

Overtime (more than 44 hours) that has been agreed to by the faculty (see SWF - Sample and Explanation section M) and reflected on the signed SWF is to be recorded by the faculty on an overtime form and submitted at the end of the month to the supervisor. The overtime form is found on myConestoga under Human Resources.

The supervisor will review and sign the form and then submit to Academic Planner for processing.

Overtime is paid when an absence/holiday falls on a non-teaching day as it is assumed all preparation, delivery and evaluation and teaching contact hours were accomplished for the week.

Overtime will be adjusted if an audit shows (see SWF Audit Process) that the total workload is at or below 44 hours.

Modified Workload Arrangements (MWA)

In order to meet the delivery needs of specific courses or programs, MWAs may be agreed on instead of the specific workload arrangements detailed in Article 11. MWAs most frequently occur in areas where enrolment and activity fluctuate significantly during a semester or other defined period of time. SWFs are not created when a MWA is put in place. A MWA requires the consent of the faculty members involved and the Local Union. (Article 11.09 A1)

In order for a MWA to be implemented at least 2/3 of the faculty members involved and their supervisor must agree. Faculty not agreeing must be given the option of a SWF and having the regular provisions of Article 11 apply. (Article 11.09 A2)

No more than 20% of the full-time faculty members at Conestoga may be participating in MWAs at the same time. (Article 11.09 A3)

The MWA may apply for any period of time but shall not extend beyond one academic year unless expressly renewed and must have a start and end date. (Article 11.09 A4)

Workload Monitoring Group (WMG) Steps

1. Faculty member returns signed and dated SWF after adding specific details under Faculty Member's Comments, about the workload that requires review, (see SWF - Sample and Explanation section J), to supervisor, **within 5 working days**. (Article 11.02 A3 & A4) The faculty member must retain a copy of the SWF submitted to the supervisor.
2. The completed, not agreed to SWF will be forwarded by the supervisor to the WMG **within 3 working days** and the faculty member copied. (Article 11.02 A3 & A4)
3. In order to provide an opportunity for the supervisor to adjust the SWF based on the complaint, a discussion between the faculty member and supervisor shall take place **within 14 calendar days** after the signed and dated SWF is returned. (Article 11.02 A6 (a))
4. Supervisor provides a written response to the faculty member **within 7 calendar days**. (Article 11.02 A6 (a))
5. If no agreement is reached, the supervisor provides comments under Supervisors Comments (see SWF - Sample and Explanation section H) on the SWF and returns the SWF to faculty member via e-mail.
6. Failing satisfactory resolution of the complaint, the faculty member may refer the complaint, in writing, to the WMG Co-Chairs **within 7 calendar days** of the supervisor's reply. (Article 11.02 A6 (a))
7. Upon receipt of a SWF indicating referral to WMG, the supervisor/designate should follow the same process as above with the exception that the SWF should be attached to an email with the title "WMG Referral – Smith, John W2019", and sent to the Faculty Union Office, WMG Co-Chairs, Academic Planner, as well as the faculty member. For administrative purposes and to help facilitate a WMG meeting, HR is also to be copied.
8. The WMG shall meet where feasible **within one week** of receipt of a workload complaint or at the request of any member of the WMG. (Article 11.02 D1) The faculty member and supervisor will both attend the meeting and make presentations related to the workload complaint. After the presentation the members of the WMG may ask questions for clarification. Following the presentation the WMG discuss both presentations and reach an outcome.
9. WMG Co-Chairs will communicate the outcome in writing to both the faculty member and the supervisor. Upon resolution of the workload complaint, the supervisor will communicate any required changes to Academic Planner.
10. Academic Planner will issue a revised SWF to the supervisor who then provides the revised SWF to the faculty member. The faculty member is expected to sign, date, check the appropriate box, make a copy for themselves, and return the revised SWF to the supervisor **within 5 working days** of receiving it.
11. The signed and agreed to revised SWF shall be forwarded with **3 working days** of receipt to the Faculty Union Office, indicating the revised status in the title of the document (e.g., "John Smith – W2019 – Date Revised").
12. The Workload Monitoring Group is composed of an equal number of Local Union Executive and College Administrators who review workload complaints. (Article 11.02 B2) For current WMG members names please refer to Contact Information (Appendix C).

The Standard Workload Form – Sample and Explanation

Introduction

As per Article 11.02 A, the SWF shall include all details of the total workload.

Below is a sample SWF form, the corresponding letters A, B, C, etc. identifies certain areas of the form, to which will be referred in the following sections.



CONESTOGA

Employee:
Department: BXXX – School of Business

Standard Workload Form

Full time

Coordinator: One Step Two Step N/A
 Probationary: Yes No

A Period Covered by SWF From 20XX-09-03 to 20XX-12-16

Course/Subject Identification	Assigned Teaching Contact Hours	Language(s) of Instruction	Preparation				Evaluation				Comp. Hours Allowance	Assigned Hours	
			Type	Factor	Attributed Hours	Additional Attrib. Hours	Class Size	Type	Factor	Attributed Hours			Additional Attrib. Hours
Number of different course preparations:	3												
Number of different sections:	3												
Number of languages of instruction:	1												
References to Collective Agreement	11.01 B,C	11.01 D	11.01 D	11.01 D	11.01 D	11.01 D	11.01 E	11.01 E	11.01 E	11.01 E	11.01 E	11.01 F1	11.01 D,F,G
BIOT1037 - Doon - Section 1 LA1 Meet 1 Biochemistry	2	E	7-SB-EB	0.6	1.2	0	35	IP E/P	.0092 .03	1.66			
BIOT1037 - Doon - Section 1 LA2 Meet 1 Biochemistry	2	E	SB-RB	0.35	0.7	0	35	IP E/P	.0092 .03	1.66			
BIOT1037 - Doon - Section 1 TH1 Meet 1 Biochemistry	2	E	5-EB	0.6	1.2	0	70	IP E/P	.0092 .03	3.33			
BIOT2140 - Doon - Section 1 LA1 Meet 1 Lab Skills for Biotech	3	E	1-NW	1.1	3.3	0	15	R/A E/P	.015 .03	1.28			
MATH1995 - Doon - Section 1 LA1 Meet 1 Algebra for the Life Sciences	1	E	5-EB	0.6	0.6	0	35	IP E/P	.0092 .03	0.76			
MATH1995 - Doon - Section 1 LA2 Meet 1 Algebra for the Life Sciences	1	E	9-RB	0.35	0.35	0	35	IP E/P	.0092 .03	0.76			
MATH1995 - Doon - Section 1 TH1 Meet 1 Algebra for the Life Sciences	2	E	5-EB	0.6	1.2	0	70	IP E/P	.0092 .03	3.04			
WEEKLY TOTALS	13				8.55	0				12.49		6	3

Preparation hours per course = Factor X Teaching hours

Evaluation hours per course = Factor X # Students X Teaching hours

D Accumulated totals to SWF period end date

C Summary of weekly totals

Assigned teaching contact hours / week	13
Preparation hours / week	8.55
Evaluation feedback hours / week	12.49
Complementary hours (allowance) / week (minimum 6)	6
Complementary hours (assigned) / week	3
Total this period SWF	43.04

	Teaching		Teaching
	Contact Hours	Contact Days	Weeks
Balance from previous SWF	0	0	0
Total this period SWF	182	70	14
Total to end date	182	70	14

E Complementary functions for academic year or SWF period

	Weekly attributed hours
Complementary Hours Allowance	6
Other - CIM Liaison	1
Other - Joint Occupational Health & Safety Committee Representative (GUELPH)	1
Curriculum Development	1
Tot	9



F Dates of discussion of proposed workload: _____ Date SWF received by faculty member: **G** _____

H Supervisor's Comments

I Supervisor's Signature _____ Date _____

J Faculty Member's Comments

NOTE: If not in agreement with the total workload, the faculty member must so indicate in writing within five (5) days from the date of receipt of the SWF and return a copy to the supervisor.

K Faculty Member's Signature _____ Date _____

- L**
- Mutual agreement of assigned workload
 - Proposed workload referred to college workload monitoring group
 - Proposed workload referred to workload resolution arbitrator

M

Voluntary overtime agreement

In accordance with article 11.01 J 2 overtime will be compensated at the rate of 0.1% of annual regular salary.

I hereby agree to one Teaching Contact Hour or _____

Faculty Member's Signature Date

A. The Period Covered by SWF

The **Period Covered by SWF** must begin and end with a teaching contact week. The week of Sunday to Saturday should be used for SWF purposes. Consecutive SWFs must avoid splitting of a teaching contact week. A normal week in the SWF context consists of 5 workdays, Monday to Friday and up to 44 hours of total workload. Non-teaching periods prior to or following a teaching period are not reflected in the SWF dates.

B. Course/Subject Identification (Teaching Contact Hour, Preparation, and Evaluation Factors)

This area outlines the course/subject details as specified in Appendix I of the Collective Agreement. The information for each course is entered into SIS, which performs the necessary calculations as prescribed by the Collective Agreement.

Each Teaching Contact Hour (TCH) is considered to be a fifty (50) minute block with a break of up to ten (10) minutes. TCHs on the SWF and timetable must be in whole hours.

The maximum number of TCHs per week are limited to 18 hours for Post-Secondary programs and 20 hours for Non-Post-Secondary Programs. (Article 11.01 J)

When an activity involves TCHs, it is to be credited on the SWF and attributed preparation and evaluation/feedback hours calculated in accordance with the applicable factors.

Evaluation Factors

The factors used for a particular course are to be arrived at through consultation with the faculty member and/or with reference to the course documentation. (Article 11.01 E3)

Options include essay/projects, routine or assisted evaluation and feedback, in-process evaluation and feedback. More than one type of evaluation and feedback may be required for a particular course. For more information on types of evaluations and feedback refer to Article 11.01 E2.

When necessary additional attributed hours should be negotiated and entered on the SWF

Preparation Factors

In assessing whether a course is "New" or "Established", it is the course content that is determinative, not the course number(s). For example, there have been many instances where a course number has been changed but the content has not. The change instead is specific to the course title, a change in the department which is responsible for the course content, or the identification of laboratory sessions separate from the theory portion of a course, etc. There are also instances where course content has been reduced and a new number assigned.

In the case of a course having new content, this should be reviewed on a case by case basis; via consultation with faculty member, i.e. "New" to the faculty member in question, the course is to be treated as "New" for the purposes of determining attributed preparation hours on the SWF.

As per Article 11.01 D2 "No more than four different course preparations shall be assigned to a teacher within a given week except by voluntary agreement which will not be unreasonably withheld."

For the purposes of the formula and as per Article 11.01 D3 the following applies:

- a) "New" refers to the first section of a course which the teacher is
 - Teaching for the first time;
 - Teaching for the first time since a major revision of the course or curriculum has been approved by the College.
- b) "Established A" refers to the section of a course which the teacher has previously taught but not within the previous three years.

- c) “Established B” refers to the first section of a course which the teacher has taught within the previous three years.
- d) “Repeat A” refers to another section which the teacher is teaching concurrently with the same course and for which prep hours have been attributed under “New” or “Established” but to students in a different program or year of study.
- e) “Repeat B” refers to another section which the teacher is teaching concurrently with the same course and for which prep hours have been attributed under “New” or “Established” to students in the same program and year of study.

When necessary additional attributed hours should be negotiated and entered on the SWF.

C. Summary of Weekly Totals

The column totals from Area B are carried to this area and provision is made for the minimum 6 hour/week complementary hours allowance. All SWFs issued must have the Complementary Hours Allowance.

The Complementary Hours Allowance consists of six (6) attributed hours each week: four (4) for routine out-of-class assistance to students and two (2) for normal administrative tasks. Neither the faculty member nor the college is expected to specifically account for this six (6) hour allowance.

The attribution of four (4) hours of out-of-class assistance for students may not be sufficient where a faculty member has an unusually high number of students on their SWF. When a faculty member has more than 260 students in their total course load, a discussion between the supervisor and faculty member may take place to find ways to alleviate the concern of providing appropriate out-of-class assistance to the students or providing the faculty member with additional attributed hours. Where an agreement cannot be reached between the supervisor and faculty member, the faculty member shall be attributed an additional 0.015 hour for every student in excess of 260. (Article 11.01 F2)

The totals for the seventh column from the left, Additional Attributed, and the last column on the right, Complementary Hours Assigned, are combined in Area E to yield a total in the fifth line, Complementary Hours.

D. Accumulated Totals to SWF Period End Date

This area indicates the accumulation of teaching contact hours, contact days, and teaching weeks from the beginning of the academic year to the end of the SWF period.

The annual limits for contact hours, contact days, and contact weeks are as follows:

- a) Contact Teaching Hours: 648 hours for Post-Secondary Programs, and 760 hours for Non-Post-Secondary Programs (Article 11.01 K3).
- b) Contact Teaching Days: 180 days for Post-Secondary Programs, and 190 days for Non-Post-Secondary Programs (Article 11.01 K1).
- c) Contact Teaching Weeks: 36 weeks for Post-Secondary Programs and 38 weeks for Non-Post-Secondary Programs (Article 11.01 B1, D1, E1, F1, I1).

In instances where the faculty member has transferred to another department during the academic year, the accumulated teaching contact hours/days/weeks must be brought forward from the previous SWF(s).

E. Complementary Functions for Academic Year

Complementary Functions are any assigned activities, which are consistent with the class definitions of Professor/Instructor and which are not TCHs or the related attributed preparation and evaluation/feedback factors. (Article 11.01 F1)

Other complementary functions, beyond the minimum six (6) hours allowance, are to be documented and assigned on the SWF. Union Business Release is exempted from being assigned whole hours.

Examples of activities to be included, where appropriate are:

- Curriculum Development – to include course code or description if no course code
- Applied Research – to include project title or description
- Curriculum Guidance
Assigned responsibility to provide curriculum guidance and support to other teachers:
.5 hr (1-2 teachers), 1 hr (3-6 teachers), 1.5 hrs (8-11 teachers, >11 teachers (time determined by discussion between supervisor and faculty member)
- Degree Collaboration
.25 hrs per week for each unique degree course taught by a faculty member
- Degree Meeting
- Refrain from using “Other.”

Supervisors are required to specify all complementary functions and to describe in detail each task to be performed by the faculty member during the teaching periods covered by the SWF.

The assigned complementary functions may be amended during the period of a particular SWF or on a SWF for a subsequent teaching period at the discretion of the College, but subject to requirements for consultation and the right of the faculty member to refer an amended SWF to the WMG.

However, regardless of the College's right to amend a SWF as unexpected circumstances arise, the requirement is to identify all complementary functions, which will be assigned in the teaching period. Every effort should be made to identify those functions during the discussion to establish the total workload. Amendments should be kept to an essential minimum.

F. Dates of Discussion of Proposed Workload

Dates of discussion of the proposed workload between supervisor and faculty member must be recorded by the supervisor in this area. If an amended SWF is issued, the date of the discussion for the revisions must be recorded by the supervisor.

G. Date SWF Received by the Faculty Member

This is the date that the faculty member receives and reads the SWF not the date the SWF is delivered to a mail slot. Faculty member is expected to record date of receipt.

H. Supervisor's Comments

Area for supervisor to record comments (i.e. brief summary of discussion, workload reduction, assignments in lieu of teaching, etc.).

I. Supervisor's Signature

Area for supervisor to sign the SWF. All SWFs must contain the supervisor's signature prior to sending to the faculty member.

J. Faculty Member's Comments

Area for faculty member to record comments about the workload when there is no agreement.

K. Faculty Member's Signature and Date

Area for faculty member to sign the SWF. The faculty member must enter this date on the actual date of signing.

L. Agreement/Referral of Workload

The faculty member is to complete this section by selecting either Mutual Agreement or Referral to the WMG. Referral to the Arbitrator can only occur after consideration of a decision by the WMG. The faculty member should indicate the appropriate "X" manually.

M. Voluntary Overtime Agreement (Applies to Non-Probationary Employees Only)

This area of the SWF is to be completed and signed by the faculty member only in instances where weekly limits (44 hours) are exceeded. (Article 11.01 J) See General SWF Information – Overtime

Overtime is paid after audit date each semester if any of the following instances occur:

- Weekly TCHs beyond 18 (or 20) hours, or weekly totals beyond 44 hours are all to be paid at the hourly overtime rate of 0.1 % of the faculty member's annual salary. Such weekly overtime must be on a voluntary basis and cannot exceed one (1) TCH or three (3) workload hours per week, that is, the "Total this period SWF" cannot be over 47 hours.
- Where a faculty member is assigned beyond the annual maximum of 648 (760) TCHs or 180 (190) days, payment for the excess hours or days must be in accordance with Article 11.01 K4 (i) or (ii) as appropriate.
- Assigning overtime beyond the limits is a clear violation of the Collective Agreement. In exceptional circumstances, matters of assignment beyond the limits must be discussed with the President of the Local prior to an assignment being finalized

Supervisor/Chair SWF Checklist

Below are the steps for supervisors to follow for completing the Standard Workload Form process. Refer to Preparation of SWFs and Timelines for more detail. Please pay special attention to the bolded and underlined areas.

1. Prior to the establishment of a total workload, have a discussion with each faculty member regarding work assignment, face to face or via email.
 - a. Sample email communication:

"Hello _____, I am writing to invite a discussion regarding your workload for the _____ period. The following are some of my ideas about courses and complementary functions:

TCHs

Course Code: Title (Theory, Lab, Online, etc.)

Course Code: Title (Theory, Lab, Online, etc.)

Complementary Functions:

Curriculum Development for _____ (fill in Course Code: Title), course outline and IP, etc.

Can you provide me with your ideas and feedback? We can arrange to meet or discuss this through email. Please let me know by _____."

2. Populate work assignment information on loading sheet and forward to Scheduling Office.
3. SWF will be generated by Scheduling Office.
4. Scheduling Office returns to supervisor.
5. Supervisor reviews SWF in its entirety.
 - a. If there are no corrections:
 - i. **Sign and date (2 places, discussion date, signature date).**

The diagram shows the flow of information on the Standard Workload Form. At the top right, it identifies the 'Employee' and 'Department: B430 - Preparatory Programs'. The main title is 'Standard Workload Form'. Below this, there are several sections: 'Dates of discussion of proposed workload:' followed by a grey box; 'Supervisor's Comments' with an arrow pointing up to the grey box; 'Chair fills dates and comments.' with an arrow pointing to the Supervisor's Comments line; 'Chair signs here.' with an arrow pointing to the Supervisor's Signature line; and 'Chair dates here.' with an arrow pointing to the Date line. The bottom of the form has lines for 'Supervisor's Signature' and 'Date'.

- b. If there are corrections required:
 - i. Communicate correction to Scheduling Office;
 - ii. Receive corrected SWF back;
 - iii. **Sign and date (2 places, discussion date, signature date).**

Employee: [REDACTED]
Department: B430 - Preparatory Programs

CONESTOGA Standard Workload Form

Dates of discussion of proposed workload:
Supervisor's Comments

Chair fills dates and

Chair signs here.

Chair dates here.

Supervisor's Signature Date

6. Issue SWF to faculty member and await response within 5 working days.
 - a. If not issued electronically, e-mail faculty member to indicate a hard copy SWF has been issued to mailbox. SWF must be placed in an envelope to ensure privacy.
7. Ensure proper tracking is in place for sent, received, revised, and invoked SWFs. Option exists to use "SWF Employee Tracking Sheet" report in SIS.
8. Receipt of SWF - within timeline 5 working days of issue.
9. Received SWF back from faculty member:
 - a. With revisions required, repeat process above starting with discussion.
 - b. With no revisions required:
 - i. Ensure all areas **signed and dated**.
 - ii. Send completed SWF to Scheduling Office.

Employee: [REDACTED]
Department: B430 - Preparatory Programs

CONESTOGA Standard Workload Form

Dates of discussion of proposed workload:
Supervisor's Comments

Chair fills dates and comments.

Chair signs here.

Chair dates here.

Supervisor's Signature Date

10. When no SWF is received back from faculty member within 5 working days:
 - a. Please consider, if faculty member is away (sick, vacation, PD etc.).
 - b. If faculty member is not away, follow up (ensure they have received SWF).
 - c. SWF is deemed accepted (invoked).
 - i. Place note in supervisor's comment area;
 - ii. Send completed signed copy (all pages) of invoked SWF to faculty member and Scheduling Office.
11. Once the SWF is returned to Scheduling Office the SWF Appendix in SIS is updated and the SWF is electronically saved and scanned to Local Union Office.

Faculty Member SWF Checklist

Below are the steps for a faculty member to follow for filling out the Standard Workload Form. Refer to Preparation of SWFs and Timelines for more detail. Please pay special attention to the bolded and underlined areas.

1. Prior to issuing the establishment of a total workload, the faculty member will have a discussion with their supervisor, face to face or via email.

2. When faculty member receives a SWF from the supervisor, the faculty member **fills in the date** that SWF Received – top right hand corner of document.

3. Review the SWF in its entirety.
4. Ensure SWF has been **signed** by supervisor.
5. Instruction for Agreement/Referral section:
 - a. If you agree to work assignment – Check Mutual agreement of assigned workload box (recommend faculty member to make a copy for record keeping.)

- b. If there are questions/concerns – Check Proposed workload referred to college workload monitoring group box. **This will stop the 5-day requirement and initiates the conversation to resolve the issue.*

6. Add appropriate comments if necessary. If referring to WMG comments regarding the specific details of the workload that are part of the workload, complaint should be added.

7. **Sign and date.**
8. Make a copy.
9. Submit to supervisor.

SWF Audit Process

Initially, all SWFs are projected and calculated based on the projected student registration. After the audit date (November, March and July), an actual SWF is recalculated using the actual student registration numbers.

Impact:

- Faculty members who were in overtime but come out of overtime based on actual student registration will only receive overtime pay from semester start to audit date;
- Faculty members who were not in overtime but come into overtime based on actual student registration will receive overtime pay retroactive to semester start;
- Faculty members who are still in overtime but overtime has increased will be able to receive overtime pay for increase retroactive to semester start;
- Faculty members who are still in overtime but overtime has decreased will continue to receive overtime pay but will need to submit the decreased overtime amount from the audit date forward.

Process:

1. Following the course drop date, ITS populates all SWFs with actual student enrolment (i.e. SWF Assignment details screen: Number of Students – Verified is populated).
2. Academic Planner to run SIS report (SWF Comprehensive Report) to review/identify faculty members that were in overtime based on projected class size.
3. Academic Planner to run SIS report (SWF Comprehensive Report) to review/identify faculty members that are now in overtime based on actual class size.
4. Compare SWF Period Total Hours – Projected to SWF Period Total Hours – Actual
 - a. Identify faculty members where: Overtime (OT) has decreased, OT has increased, Faculty is no longer in OT, or Faculty is now in OT.
5. If SWF OT has changed as per #4 (see above), SWF Actual is generated and sent to supervisor for signature, along with relevant SWF Audit Memo, (as a package at one time where possible).
 - a. At this time, leave all existing information intact on the SWF Appendix screen, reflecting the dates and agreement as inputted from original signed SWF.
6. Supervisor/designate distributes SWF Actual to faculty member for signature.
7. Signed SWF Actual returned to Academic Planner.
8. SWF Actual forwarded to Local Union Office with a copy sent to the faculty member.
9. Overtime process followed as required (Overtime submissions are tracked to avoid duplicate submissions; absences checked).

Table of Due Dates

Term	SWF Due Dates to Faculty
Spring 2019	Thursday, March 21, 2019
Fall 2019	Friday, May 17, 2019
Winter 2020	Thursday, November 21, 2019 (Full-Time Academic) Wednesday, November 13, 2019 (Apprenticeship)
Spring 2020	Thursday, March 26, 2020

Contact Information

Name	Position	Phone
Lana-Lee Hardacre	President Local 237/WMG Co-Chair	3734
Barbara Kelly	Vice President, Academic Administration and Human Resources/WMG Member	2217
Dennis Long	Local 237 Treasurer/WMG Member	3238
Mitko Mancevski	Local 237 Chief Steward/WMG Member	3428
Suzanne Moyer	Chair Trades & Apprenticeship/WMG Member	5234
Maureen Murphy-Fricker	Local 237 Vice President/WMG Member	3893
Shelley Schenk	Director Human Resources/WMG Member	3333
Goranka Vukelich	Executive Dean Community Services/WMG Co-Chair	3393
HR General Inquiry	hrinfo@conestogac.on.ca	3399

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