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Introduction

This Reference guide has been created to assist Chairs and Deans at Algonquin College with administering the application of the Standard Workload Form.

If you have any specific questions, please contact Nancy Caithness, Acting Workload and Data Management Officer in Human Resources at extension 2934.

1.00 Policy Guidelines for Chairs and Deans

1.01 Application

The provisions of articles 11.01 and 11.02 of the Collective Agreement are to be followed in developing workload assignments for full-time professors and instructors. These guidelines provide management with the college interpretation of these provisions for reference when developing workload assignments for full-time Faculty. Preparation of Standard Workload Forms (SWFs) is required for all probationary and regular full-time professors and instructors who are teaching for a specific period of time. In cases where non-teaching activities such as curriculum development, coordinating or special project in lieu of teaching are assigned, a manual SWF shall be prepared. (Please refer to Non-Teaching Periods below for further clarification)


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. Such activities will neither be recorded nor scheduled except as in accordance with Article 11.01G1."

Standard workload forms (SWFs) are not to be completed for non-teaching periods.

The method of communicating these assignments as well as obtaining mutual consent is at the discretion of the supervisor (written and/or verbal communication may be used). It is not necessary to forward copies of non-teaching assignments to HR.

1.02 Preparation of SWFs and Timelines

The total workload must be developed and discussed with the professor/instructor and a SWF completed for each defined teaching period. The following timelines must be adhered to when
discussing, developing and completing a SWF:

1) Discussion of an upcoming assignment and the subsequent completion of a SWF are to occur at least six (6) weeks prior to the start of the SWF period, exclusive of holidays and vacation time (11.02A1(a)).

2) Each professor is expected to sign and return the SWF within five (5) working days of receiving it from the supervisor. If the SWF is not returned within five (5) working days, the supervisor deems the SWF to have been accepted as per the Academic Collective Agreement (Article 11.02 A4). A note should be made in the Supervisor’s Comment area indicating the SWF was not signed within 5 days and it has been deemed accepted.

3) All signed or deemed accepted SWFs shall be forwarded within three days (3) of receipt to both HR and the Faculty Union Office. The steps for submitting SWFs are as follows:
   a) Following the completion of the SWF, either by signature of the 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 – 2012S”). 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 cannot be saved together in one document.
   c) The Budget/Curriculum Officer prepares an email with the SWFs for Faculty attached and sends to the Chair or Dean, with the subject line “Faculty SWF Submission – 2012S” (or the applicable semester). In the body of the email, please list the names of the Faculty members whose SWFs are attached.
   d) As per Article 11.02 A4, the Chair or Dean must forward this email to the Workload Monitoring Group within 3 working days following the acceptance of the SWF, which includes acceptance by virtue of not responding within 5 days of issuance. The Chair or Dean should send this email addressed to the President, OPSEU Local 415, Annette Bouzi (bouzia@algonquincollege.com), with a copy to Nancy Caithness at caithnn@algonquincollege.com. It is recommended that a read receipt be placed on the email.
   e) Where a revised SWF is issued, please follow the same process as above, indicating the revised status in the title of the document (e.g., “Smith, John – 2018W – Revised”).
   f) Where a SWF is disputed and referred to the Workload Monitoring Group, the Chair or Dean 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.”
Table 1.1: Example of SWF Preparation/Submission Schedule – Faculty Contract Deadlines – Winter 2019 – January 7, 2019 to April 27, 2019 (Study Break, February 18-22, 2019)

<table>
<thead>
<tr>
<th>Teaching Start Date</th>
<th>SWF Professor (6 weeks prior to start of teaching assignment)</th>
<th>Professor to return signed SWF to Chair or Dean (Five working days after receipt)</th>
<th>1 copy of SWF to be sent to Union Office and to HR (Three working days after receipt)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Friday</td>
<td>Friday</td>
<td>Wednesday</td>
</tr>
<tr>
<td>January 2</td>
<td>November 09</td>
<td>November 16</td>
<td>November 21</td>
</tr>
<tr>
<td>January 7</td>
<td>November 16</td>
<td>November 23</td>
<td>November 28</td>
</tr>
<tr>
<td>January 17</td>
<td>November 23</td>
<td>November 30</td>
<td>December 5</td>
</tr>
<tr>
<td>January 21</td>
<td>November 30</td>
<td>December 7</td>
<td>December 12</td>
</tr>
</tbody>
</table>

Table 1.2: SWF Preparation/Submission Schedule – Faculty Contract Deadlines - Spring 2019 – May 6, 2018 to August 17, 2019

<table>
<thead>
<tr>
<th>Teaching Start Date</th>
<th>SWF Professor (6 weeks prior to start of teaching assignment)</th>
<th>Professor to return signed SWF to Chair or Dean (Five working days after receipt)</th>
<th>1 copy of SWF to be sent to Union Office and to HR (Three working days after receipt)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Friday</td>
<td>Friday</td>
<td>Wednesday</td>
</tr>
<tr>
<td>April 29</td>
<td>March 15</td>
<td>March 22</td>
<td>March 27</td>
</tr>
<tr>
<td>May 6</td>
<td>March 22</td>
<td>March 29</td>
<td>April 3</td>
</tr>
<tr>
<td>May 13</td>
<td>March 29</td>
<td>April 5</td>
<td>April 10</td>
</tr>
<tr>
<td>Tuesday, May 21</td>
<td>April 5</td>
<td>April 12</td>
<td>April 17</td>
</tr>
</tbody>
</table>

Table 1.3: SWF Preparation/Submission Schedule – Faculty Contract Deadlines - Fall 2019 – September 3, 2019 to December 15, 2019

<table>
<thead>
<tr>
<th>Teaching Start Date</th>
<th>SWF Professor (6 weeks prior to start of teaching assignment)</th>
<th>Professor to return signed SWF to Chair or Dean (Five working days after receipt)</th>
<th>1 copy of SWF to be sent to Union Office and to HR (Three working days after receipt)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Friday</td>
<td>Friday</td>
<td>Wednesday</td>
</tr>
<tr>
<td>August 26</td>
<td>May 10</td>
<td>May 17</td>
<td>Thursday, May 23</td>
</tr>
<tr>
<td>Tuesday, September 3</td>
<td>May 17</td>
<td>Monday, May 27</td>
<td>Thursday, May 30</td>
</tr>
<tr>
<td>September 9</td>
<td>May 24</td>
<td>June 1</td>
<td>June 5</td>
</tr>
<tr>
<td>September 16</td>
<td>June May 31</td>
<td>June 7</td>
<td>June 12</td>
</tr>
</tbody>
</table>
2.00 The Standard Workload Form

2.01 Introduction

In the Appendix, there is a sample of a SWF. On this sample SWF FORM there are letters A, B, C, etc. identifying certain areas of the form which will be referred to in the following sections.

2.02 Area A - Demographic Information

This area contains the following information:
   a) College name
   b) College department
   c) Professor name
   d) Status (probationary/non-probationary)
   e) Type (full-time, partial load, part-time sessional)
   f) Coordinator status, and
   g) SWF period covered

The SWF period must begin and end with a teaching contact week. The week of Monday to Sunday should be used for SWF purposes. Consecutive SWFs must avoid splitting of a teaching contact week. A nominal week in the SWF context consists of five (5) workdays and up to forty-four (44) hours of total workload. Normally the five (5) workdays will be Monday to Friday.

Non-teaching periods prior to or following a teaching period are not reflected in the SWF dates (i.e. 2-Sept 2008 to 14-Dec-2008, not 1-Sept-2008 to 30-Dec-2008). In this way SWF and timetable dates should correspond.

2.03 Area B - Course/Subject Information (TCHs, Preparation and Evaluation Factors)

This area outlines the course/subject details as specified in the in Appendix I of the Collective Agreement. The information for each course is entered into Genesis 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. An arbitrator has ruled that the assigning of TCHs in partial hours is in violation of the Collective Agreement. Consequently, although courses may be scheduled in partial hour blocks, the assigning of these hours on the SWF must be in whole hours.

When an activity does involve TCHs, it is to be credited on the SWF and attributed preparation and evaluation/feedback hours calculated in accordance with the applicable factors. The factors used for a particular course are to be arrived at through consultation with the professor/instructor and/or with reference to the course documentation (Please see course particulars on GeneSIS to identify default factors that have been assigned.)
Where necessary, additional attributed hours should be negotiated and entered on the course line of the SWF. The total evaluation/feedback allowance for a course should be reasonable and reflect the nature of the type(s) of grading necessary in the course.

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 11.01J)

**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 i.e. "New" to the professor in question, the course is to be treated as "New" for the purposes of determining attributed preparation hours on the SWF.

2.05 Area D - Summary of Weekly Totals

The column totals from Area B are carried to this area and provision is made for the minimum 6 hr/wk 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 professor 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 professor/instructor has an unusually high number of students on their SWF. When a professor/instructor has more than 260 students in their total course load, a discussion between the Chair or Dean and the 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 by the Chair/Dean or the Faculty member, the professor/instructor shall be attributed an additional 0.015 hour for every student in excess of 260. (Article 11.01F2)

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 (assigned)/week, i.e. 3.5 = 2.0 + 1.5

2.06 Area E - 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 11.01K1)

C. **Contact Teaching Weeks**: 36 weeks for Post-Secondary Programs and 38 weeks for Non-Post-Secondary Programs

In instances where the professor has transferred to another department during the academic year, the accumulated teaching contact hrs/days/wks must be brought forward from the previous SWF(s).
2.07 Area F - Complementary Functions for Academic Year

Complementary Functions are any assigned activities, which are within the class definition of a professor (Page 147 and 149 of the Collective Agreement), and which are not TCHs or the related attributed preparation and attributed evaluation/feedback activities.

Other complementary functions, beyond the six (6) hours allowance, are to be assigned on an **hour-for-hour basis rounded up** and shown on the SWF. (Union Business Release is exempted from being assigned whole hours.) Examples of activities to be included, where appropriate are:

- Meetings of various committees (include names) directly associated with the work of the college. To be credited on a SWF, committee time must be approved in advance by the supervisor. Liaison with business, industry, institutions, other groups, etc.
- Planning and development related to curricula, program revision, facilities, equipment, texts, etc. which is not connected to scheduled TCHs.
- Class tours, testing/interviewing/selecting applicants, field trips, and promotional activities.
- Equipment diagnosis, monitoring, maintenance, scheduling.
- Authorized travel.
- Other assigned functions as appropriate.

Supervisors are **required** to specify **ALL** the complementary functions and use the appropriate complementary functions used in Genesis and to describe briefly the complementary function to be performed by the professor/instructor during the teaching periods covered by the SWF. Complementary codes/functions are as follows:

- 20, 21, 22, 23 & 24 **Other** (This is to be used only where no code exists for the activity*)
- 25 **Additional-Out-of-Class Assistance** (Specify Program/Courses)
- 30 **Academic Advising** (1 hour for every 20 students Specify Program/Courses, Number of students)
- 31 **Accreditation** (Certification, Declaration)
- 32 **Applied Research** (Research title)
- 33 **Committee Membership** (Specify name of committee)
- 34 **Coordinating-Program** (Specify program and ensure Coordinator Allowance is given)
- 35 **Coordinating-Subject** (Specify Courses and ensure Coordinator Allowance is given)
- 36 **Course Lead** (Course code)
- 37 **Curriculum-Development** (Course (code) development, Course (code) renewal, New program feasibility/ proposal, Course Outline development (code))
- 38 **Curriculum-Review** (Course review (code), Pathway, Program review (code), For industry cert, ACR)
- 39 **Industry Relations** (Industry liaison, OACETT liaison, Networking event, PAC)
- 40 **Mentoring** (International Professor, New Prof/ Coordinator)
- 41 **Placement** (Work placement, Field placement, Placement prep, Placement support, Placement supervision, Clinical placement support Specify programs/courses)
- 42 **Professional Development** (Describe PD assigned, e.g. Faculty Learning Program)
- 43 **Project** (e.g. Consultation, Develop manual, Stars of the City, Working group for WSYAS, Hair Donation Ottawa)
- 44 **Quality Assurance** (Specify Program/Courses PQR, Degree consent renewal support/lead)
- 45 **Scholarly Activity** (Academic Research, Conferences)
- 46 **Student Competitions** (Design comp, Skills Canada, OCMC)
- 47 **Student Recruitment** (Open House, Program marketing, Program promotion)
- 48 **Union Business** (College, Province)
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 professor 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 teaching period. Every effort should be made to identify those functions before SWF preparation and amendments should be kept to an essential minimum.

2.08 Area G - Dates of Discussion of Proposed Workload

Dates of discussion of proposed workload **must** be recorded in this area. If an amended SWF is issued, the date of discussion of that SWF version should be added to this field.

2.09 Area H - Date SWF Received by the Professor

This is the date the professor *receives* the SWF FORM not the date the SWF FORM is delivered to a mail slot.

2.10 Area I - Supervisor's Comments

Area for supervisor to record comments (i.e. exam week, invigilation, field work/clinical hours, workload reduction, assignments in lieu of teaching, etc.).

2.11 Area J - Supervisor's Signature

Area for supervisor to sign the SWF. All SWFs must contain the Supervisor’s signature prior to sending to professor.

2.12 Area K - Faculty Member's Comments

Area for professor to record comments.

2.13 Area L - Faculty Member's Signature

Area for professor to sign the SWF. The professor should enter this date on the actual date of signing.

2.14 Area M - Agreement/Referral of Workload

The professor 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 referral by the WMG. The professor should indicate the appropriate "X" manually.

2.15 Area N - Voluntary Overtime Agreement (Applies to non-probationary employees only)

The Collective Agreement provides for the SWF to include a section titled Voluntary Overtime Agreement. This area of the SWF is to be completed and signed by the Faculty member in instances where weekly limits are exceeded (11.01J). Overtime is paid after audit date each semester if any of the following instances occur:

- Weekly TCHs beyond 18 (or 20) hrs, or weekly totals beyond 44 hrs are all to be paid at the hourly overtime rate of 0.1 % of the professor'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 S.W.F.**" on all SWFs...
cannot be over 47 hours.

- Where a professor 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 11.01 K4 (i) or (ii) as appropriate.

Assigning overtime beyond the limits is a clear contract violation. In exceptional circumstances matters of assignment beyond the limits may be discussed with the President of the Local prior to an assignment.
Appendix A:
SWF

<table>
<thead>
<tr>
<th>Course/Subject Identification</th>
<th>Asst Tchg Langs of</th>
<th>Factor</th>
<th>Attr Hrs</th>
<th>Addn Attd Hrs</th>
<th>Class Size</th>
<th>Type</th>
<th>Factor</th>
<th>Attr Hrs</th>
<th>Addn Attd Hrs</th>
<th>Allow Assy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(B+C) (D) (E) (F)</td>
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<td>(G)</td>
<td>(H)</td>
<td>(I)</td>
<td>(J)</td>
<td>(K)</td>
<td>(L)</td>
<td>(M)</td>
<td>(N)</td>
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<tr>
<td>1W ELE2131 011</td>
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<td>60</td>
<td>RA</td>
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<td>0.00</td>
</tr>
<tr>
<td>Gas Heating Systems</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
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</tr>
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<td>0.85</td>
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<td>0.00</td>
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<td>0.0020</td>
<td>0.74</td>
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<td>Gas Heating Systems</td>
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<td>IF</td>
<td>0.0020</td>
<td>0.74</td>
<td>0.00</td>
</tr>
<tr>
<td>Weekly Totals</td>
<td>18.00</td>
<td>16.00</td>
<td>0.00</td>
<td>4.18</td>
<td>0.00</td>
<td>6.00</td>
<td>2.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Preparation Hours / Subject * Factor * Teaching Contact Hours**
Evaluation Feedback Hours / Subject = Factor * Class Size * Teaching Contact Hours

| Number of different course preparations | 2 |
| Number of different sections             | 5 |
| Number of languages of instructions      | 5 |

**SUMMARY OF WEEKLY TOTALS**

| Assigned Teaching Contact Hours/Week | 18.00 |
| Preparations Hours/Week              | 10.00 |
| Evaluation Feedback Hours/Week       | 5.00  |
| Complementary Hours (Allowance)/Week (Minimum 4) | 0.00 |
| Complementary Hours (Assigned)/Week  | 2.00  |

**Total this period S.W.F.**
42.00

**ACCUMULATED TOTALS TO S.W.F. PERIOD END DATE**

<table>
<thead>
<tr>
<th>Teaching Contact Hours</th>
<th>Contact Days</th>
<th>Teaching Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance from previous S.W.F.</td>
<td>255.00</td>
<td>75</td>
</tr>
<tr>
<td>Total this period S.W.F.</td>
<td>170.00</td>
<td>75</td>
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<tr>
<td>Total to end date</td>
<td>525.00</td>
<td>150</td>
</tr>
</tbody>
</table>
APPENDIX VIII (SWF006)  STANDWOOD FORM  PAGE 2

PROFESSOR NAME:  


COMPLIMENTARY FUNCTIONS FOR THE ACADEMIC YEAR OR S.W.F. PERIOD  

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>WEEKLY ATTRIBUTED HRS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Allowance</td>
<td>4.00</td>
</tr>
<tr>
<td>Academic Advising</td>
<td>2.00</td>
</tr>
<tr>
<td>40 students</td>
<td></td>
</tr>
</tbody>
</table>

TOTAL: 6.00  

DATES OF DISCUSSION OF THE PROPOSED WORKLOAD:  

DATE S.W.F. RECEIVED BY FACULTY MEMBER:  

SUPERVISOR’S COMMENTS:  

SUPERVISOR’S SIGNATURE:  

Manager Signature  

DATE: Nov 17/16  

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 S.W.F. AND RETURN A COPY TO THE SUPERVISOR  

FACULTY MEMBER’S SIGNATURE:  

Employee Signature  

DATE: Nov 21/2016  

(M) Mutual Agreement of Assigned Workload  
( ) Proposed Workload Referred to College Workload Monitoring Group  
( ) Proposed Workload Referred to the Workload Resolution Arbitrator  

VOLUNTARY OVERTIME AGREEMENT  

In accordance with Article 11.61 J2 overtime will be compensated at the rate of 0.1% of annual salary  

I hereby agree to one Teaching Contact Hour or [ ] Workload Hour(s)  

Faculty Member’s Signature:  

DATE:  

Last Revised: February 2020  12 | Page
Appendix B:  
Complementary Hours Description Glossary

1. **Mentoring**: To be used when guiding/assisting new part-time and full-time Faculty on courses, programs and/or software. When Faculty member is the point of contact for courses i.e. Course Lead. When Faculty member is guiding a specific Project/Initiative.

2. **Review**: To be used when performing Program or Courses Quality Reviews.

3. **Control of**: To be used when performing control of supplies and equipment for a specific program.

4. **Student Recruitment**: To be used when participating in Open Houses, recruitment campaigns.

5. **Assist**: To be used when participating in specific student projects/initiatives.

6. **Develop**: To be used when creating a project, course, materials, for a specific program or initiative.