



TERMS OF REFERENCE WORKLOAD MONITORING GROUP (WMG)

1.0 MANDATE

The Workload Monitoring Group (WMG) mandate is to ensure the institute's academic workforce has a fair and balanced workload assignment by SAIT leadership in consultation with SAIT Academic Faculty Association (SAFA) faculty. The WMG must address and resolve workload complaints promptly and consistently.

2.0 PURPOSE

When discussions between the relevant parties (faculty instructor, academic chair, associate dean, or SAFA) cannot resolve a workload matter satisfactorily, a written complaint may be submitted to the Workload Monitoring Group (WMG). The complainant may be a faculty instructor or the Association.

In compliance with the SAIT/SAFA Collective Agreement, the Faculty Workload Guidelines, and SAIT's Policies and Procedures, the WMG serves as the decision-making body to resolve workload complaints.

The WMG will:

- i. review general and individual workload assignment complaints submitted by faculty instructors or SAFA;
- ii. provide recommendations to the Faculty Workload Guidelines Committee (FWGC) on the general operation of workload assignments;
- iii. have access to all completed workload assignments, timetables, and other relevant workload data, as required to resolve workload complaints.

3.0 GUIDING PRINCIPLES

The Workload Monitoring Group will:

- Align with [SAIT's FIRST principles](#); and
- Enable a mindset of continuous improvement.

4.0 MEMBERSHIP

The Workload Monitoring Group (WMG) structure shall be formed by an equal number of appointed SAFA staff members and non-union SAIT management members, who will meet as needed to resolve workload assignment complaints and identify future workload assignment recommendations.

1. The WMG will be comprised of eight (8) members, one (1) Employee Services resource member, and one (1) SAFA resource member.

2. The WMG will be co-chaired by one SAFA and one SAIT member on an alternating basis. If a co-chair is absent, they will nominate a delegate from their party, who is trained and knowledgeable on the complaint process, to validate the complaint and determine the complaint approach with the other party's co-chair. The acting co-chairs will determine the co-chair who will manage the complaint process, host the hearing (if applicable), and document the complaint decision.
3. The SAFA president or designate shall appoint the SAFA members and the SAFA resource member to the committee and shall designate one of the SAFA members as the SAFA co-chair.
4. The vice president, academic or designate will appoint the SAIT management members and will designate one of the SAIT management members to be the SAIT co-chair; the Employee Services resource member will be appointed in consultation with the associate vice president Employee Services, or designate.
5. The committee membership will represent a variety of discipline areas, will have varying lengths of experience at SAIT, and will reflect the breadth of SAIT programming, including degree, diploma/certificate, and apprentice programs. Once members are recommended or nominated, the membership list should be examined by the nominating co-chairs to ensure their members have a variety of years of experience and the committee remains in alignment with the collective agreement.
6. The SAIT resource member from Employee Services shall act as secretary; in their absence, the SAFA resource member will attend to the secretary's duties.
7. The Employee Services resource member will perform the SAFA resource member's duties in their absence.
8. The WMG members should be dedicated to the WMG mandate and willing to participate in WMG business in the spirit of cooperation and consensus-building.
9. All WMG members agree to keep confidential all information they might receive in their capacity as members of the group.
10. The WMG members and resource members are expected to fulfill their duties and hold office for a minimum of 2 years, with half of the SAIT and half of the SAFA membership changing yearly. They may continue to hold office until a successor is appointed or selected.
11. If a member cannot continue on the WMG, the corresponding appointing member (SAFA president or vice president Academic or their designates) will name a replacing member to the group within one (1) calendar month of the member providing written notice to the co-chairs.
12. The hosting co-chair will document the complaint decisions, and the WMG secretary will update the Complaint Summaries in the Faculty Workload Guidelines Committee's (FWGC) Complaint Summary Log.
13. Names of the WMG members are included in this TOR, to be updated as required.
14. The co-chairs will select WMG members to address the complaints, ensuring a minimum of two (2) SAFA members and two (2) SAIT members are included for decisions on workload complaints.

15. Each complaint requires an evaluation by the co-chairs to determine if there are Conflicts of Interest with any of the WMG members, including the co-chairs. If a Conflict of Interest is identified, the members or co-chairs must not participate in the complaint process.
16. WMG members must keep their Outlook calendar up to date to support scheduling WMG Complaint Hearings in a timely manner.

Member, SAFA/SAIT Title	WMG Role
Blair Howes, SAFA President	WMG co-chair (SAFA)
Bengt Northwood, Associate Dean, HPS	WMG co-chair (SAIT)
Sean Duggan, Strategic HR Business Partner (Training - Amantha Ho, Team Lead, People Relations)	WMG secretary (Employee Services resource member)
Kathie Dann, SAFA Administrator	WMG SAFA resource member
Chris Irish, H&T Faculty	WMG member (SAFA)
Danny De Castro, Business Faculty	WMG member (SAFA)
Blake Kanewischer, Business Faculty	WMG member (SAFA)
Karen Baldwin, Associate Dean, SBus	WMG member (SAIT)
Hala Dehais, Associate Dean, H&T	WMG member (SAIT)
Reva Bond, Dean, SofC	WMG member (SAIT)

5.0 RESPONSIBILITIES

WMG Member Responsibilities	
Understand the SAFA Collective Agreement and the Faculty Workload Guidelines	<ul style="list-style-type: none"> • Review and understand the SAFA Collective Agreement and the Faculty Workload Guidelines • Seek clarification of questions and training from their respective appointing group
Workload Complaint Process	
Receive Workload Complaint	<p>The SAFA resource member will:</p> <ul style="list-style-type: none"> • Receive the Smartsheet Workload Complaint form in the WMG email inbox, with supporting information • Engage the relevant parties for additional information and supporting documentation • Review the documentation for completeness • Store the complaint documentation in a dedicated folder
Review Workload Complaint for resolution approach (Documentation Review or Hearing)	<p>The SAFA resource member will:</p> <ul style="list-style-type: none"> • Meet with the co-chairs to determine: <ul style="list-style-type: none"> ○ if the complaint warrants further investigation; if not, the hosting co-chair will follow the decision process, below ○ if the complaint can be considered by way of a WMG Documentation Review or a formal WMG Complaint Hearing ○ the WMG members selected to participate in the Documentation Review/Hearing and complaint decision given availability and Conflict of Interest considerations, ensuring a minimum of two (2) SAIT and two (2) SAFA members ○ the co-chair who will host the hearing (if applicable) and document the decision

WMG Member Responsibilities	
	<ul style="list-style-type: none"> Send an email to all WMG members with a summary of the complaint, a clear statement indicating the members selected to review the complaint, the resolution approach (Documentation Review or WMG Complaint Hearing), and a link to complaint documentation Notify the relevant parties (complainant, academic chair, associate dean, dean, and SAFA president) of the resolution approach within two (2) business days of submission, where feasible
Complete Documentation Review	<p>The selected WMG members will:</p> <ul style="list-style-type: none"> Review the supporting documentation, including completed workload assignments and timetables and other relevant workload data as required to decide on workload complaints
Provide recommendations based on Documentation Review only - no hearing	<ul style="list-style-type: none"> Provide an email recommendation on a resolution to selected WMG members Complete the decision-making process below
Hold WMG Complaint Hearing to determine the resolution	<p>When a WMG Complaint Hearing is required, the SAFA resource member will:</p> <ul style="list-style-type: none"> Send notice of the hearing, including the standard agenda, date, time, and location (in-person or remote) to the selected WMG members and complainant, within three (3) business days after receipt of the complaint Request individuals, including faculty, academic chairs, subject matter experts, and other members of the SAIT community, to attend the hearing as needed to investigate complaints <p>The hosting co-chair will:</p> <ul style="list-style-type: none"> Facilitate the hearing Be provided with a full explanation of the workload complaint by the complainant and hearing attendees Invite further discussion to gain sufficient understanding of the workload complaint based on the written and oral information presented Ask the complainant and attendees to leave the hearing so the WMG can determine the decision
Complete decision-making process	<p>For a Documentation Review Decision or Hearing Decision:</p> <ul style="list-style-type: none"> Consider the recommendations on a resolution from selected WMG members Determine the resolution decision through consensus Render a decision within five (5) business days of receipt of the Workload Complaint; this timeline may be extended in extenuating circumstances at the discretion of the hosting co-chair
Document and communicate complaint decision	<p>The hosting co-chair will:</p> <ul style="list-style-type: none"> Document the complaint decision in the WMG Complaint Decision Record document Circulate the WMG Complaint Decision Record to the complainant, the SAFA president, the secretary, (the academic chair, associate dean, and the dean for individual workload assignment complaints) as soon as possible after the Documentation Review or Hearing and, where feasible, within five (5) business days of receipt of the Workload Complaint Discuss with the WMG if the complaint decision has impacts on

WMG Member Responsibilities	
	<p>general workload guidance and if a recommendation should be provided to the FWGC through the FWGC Recommendation Log</p> <p>The secretary will:</p> <ul style="list-style-type: none"> • Update the FWGC Complaint Summary Log with the decision summary • File the WMG Complaint Decision Record on the Teams site
General Workload Assignment Recommendations	
<p>Provide recommendations to SAIT on the general operation of workload assignments</p>	<ul style="list-style-type: none"> • Recommend appropriate updates to the Faculty Workload Guidelines to the WMG for consideration <p>The secretary will:</p> <ul style="list-style-type: none"> • Document the recommendations for workload assignments as identified through the workload complaint process in the FWGC Recommendations Log, if deemed appropriate by the WMG
<p>Manage documentation</p>	<p>The SAFA resource member will:</p> <ul style="list-style-type: none"> • Manage the collection, maintenance, and updating of records relating to meetings in a dedicated WMG Teams site • Monitor and manage the Workload Complaint form and Smartsheet <p>The co-chairs will jointly:</p> <ul style="list-style-type: none"> • Complete an annual review, and update the Terms of Reference based on discussion and recommendations from WMG members
<p>Review Membership and Terms of Reference</p>	<ul style="list-style-type: none"> • Review membership and the Terms of Reference annually, as per the requirements in Section 2; this activity will occur as an agenda item before the new academic year begins in either a dedicated meeting or a complaint meeting • Recommend appropriate updates to the Terms of Reference to the WMG for discussion <p>The co-chairs will:</p> <ul style="list-style-type: none"> • Update the Terms of Reference as needed, based on the group discussion • Hold WMG members accountable; if a member repeatedly fails to conduct their agreed-upon duties as part of WMG business, the respective committee co-chairs will meet privately with their member to discuss whether stepping down from the WMG is appropriate

6.0 MEETINGS

The WMG shall meet, where feasible, within five (5) business days of receipt of a workload complaint or at the request of any member of the WMG. Meetings shall be conducted during regular business hours, and sufficient time must be provided for WMG members to prepare for and attend meetings.

1. The SAFA resource member shall provide a standard agenda for each WMG Complaint Hearing in the meeting invite.



2. Special meetings may be called to discuss issues or workload-related topics at the request of the co-chairs, FWGC, the SAFA president, or the vice president Academic.
3. The hosting co-chair will document and circulate the workload complaint decision within five (5) business days of receipt of the Workload Complaint; this timeline may be extended in extenuating circumstances at the discretion of the hosting co-chair.
4. Quorum for WMG Complaint Hearings is half of WMG members, providing a minimum of two (2) SAFA and two (2) SAIT voting members are present.
5. The WMG must come to a consensus when resolving complaints.

7.0 TRAINING

SAFA and SAIT must provide adequate resources, time, and training to help WMG members function effectively.

8.0 ADOPTION OF TERMS OF REFERENCE

By signing below, you acknowledge that the Workload Monitoring Group will use these Terms of Reference as the governing document by which the group is held to account for its activities.

SAFA President



 Sign

Blair Howes

 Print

Sept. 29/2022

 Date

Vice President Academic



 Sign

Tom Bornhorst

 Print

September 27, 2022

 Date