University of BRISTOL

ACADEMIC WORKLOAD ALLOCATION PRINCIPLES

A COMMON UNIVERSITY POLICY

1. Purpose of the Policy

The University is committed to the fair, reasonable and equitable allocation of work. The purpose of this policy is to set out the underlying principles of Workload Allocation and Management at the University of Bristol and is an appendix of the University Workload Agreement for Grades J and above and Grade I Academic staff.

Currently, most academic Schools use some form of workload allocation model and whilst there are some commonalities across these, there are also differences and it is rare that there is one model in a Faculty. However, important workforce planning occurs at the Faculty level, without any real sense of how workload varies between Schools. At university level, decisions are similarly made about the allocation of posts without a real sense of comparative workload between Faculties and Schools.

Therefore, from a university perspective establishing a common set of principles for workload allocation at Faculty level should inform good workforce planning and will enable the university to operate within a framework within which models for workload planning and adjustment can be operated.

2. Applicability & Scope

This policy refers to the use and management of Workload Allocation & Management and to the setting and reviewing of workload tariffs. The policy applies to all academic staff who undertake teaching and/or research in any combination with the exception of clinical academics who have an annual job plan jointly agreed with the NHS detailing their workload. Information on the workloads of staff should be recorded and used for workload planning and monitoring purposes.

3. Definitions

Common workload allocation principles – a set of common principles for workload modelling to enable the university to identify areas where workloads preclude staff spending appropriate amounts of time on research and/or scholarship, teaching and assessment. It enables an informed critique of existing structures and processes based on a realistic reckoning of the time spent on various managerial and administrative tasks alongside research and/or scholarship, teaching and assessment.

Workload allocation model - the University does not wish to frame workload issues in terms of a 'single workload model' as this terminology creates understandable concerns about the

implementation of a 'one size fits all' solution. A workload model should not refer to a single set of items with precisely the same weighting applied across all subjects as this does not reflect that there are differences between for example PhD supervision in the Arts and PhD supervision within a research group in Science.

Common workload allocation platform - software could be used to allow data to be captured in a consistent way and such a system can provide considerable flexibility in modelling. Further exploratory work on a suitable platform will need to be undertaken.

4. The 10 Common Principles of Workload Allocation & Management at the University of Bristol:

i) Workload should be fairly and transparently distributed among academic staff.
ii) The currency of the model should be hours or weeks rather than percentages.
iii) There should be no significant or protracted over or under-allocation of duties.
iv) Comparable allowances should be provided for similar teaching, research, administrative and management tasks across the different Faculties within the University.
v) Faculties can flex the hours given to different activities within guidelines to recognise the demands of different disciplines.
vi) Models should explicitly include time for research (P1 and P2) and for scholarship/pedagogy (P3) in accordance with contractual expectations.
vii) The workload model should measure time with the hours or weeks assigned to tasks being realistic and built from the bottom up based on the time needed for an effective member of staff do the task properly.
viii) The full workload should be captured but the model should not be used to make very fine distinctions in workloads and any weighting attached to tasks should be derived from the time taken to accomplish them.
ix) There should be a single model at an appropriate level of unit, which will be at least that of the School, but would be preferable at Faculty level
x) Workload should be compatible with reasonable expectations of work-life balance and the principles of equality and inclusion as well as facilitate a healthy working environment.

5. Workload Allocation & Management provides a means of recording data which then provides information on which to base decisions about workload allocation and workforce planning ensuring that key factors such as student load are recorded in a similar way across the University and across a range of activities such as:

- Teaching & assessment
- Scholarship and educational enhancement
- Curriculum development
- Student supervision
- Research, collaboration and grant writing
- Leadership & Management roles
- Personal Tutoring
- Personal Development
- Leadership and Citizenship

- Entrepreneurship

This list is not meant to be exhaustive.

6. Tariff Setting & Review

The University of Bristol Tariff is the number of hours out of an agreed total available for a full-time member of staff assigned to an activity. The tariff is based on the actual hours that each activity is expected to take to complete and there are guidelines within certain ranges. Reasons to vary tariffs between Faculties and Schools include the size and shape of each School and Faculty, profile of students, balance of teaching and research. Suggested tariffs represent the expected amount of time for an activity, derived from an evidence base arising from workload logs prepared at School level, and are not based on individual capability. Tariffs will be reviewed annually. Workload Allocation & Management principles are designed to align with other University processes such as Integrated Planning, Timetabling and Promotion and Progression and therefore data collection and recording needs to be as accurate as possible and will facilitate fair and efficient use of staff time and planning processes.

Workload models should be based on a notional working year of 1,540 hours or 44 weeks for Teaching, Research, and Scholarship, including associated support activities and taking account of employees' entitlement to annual leave, bank holidays and closure days. The University recognises that most academic staff do not have defined working hours and that this arrangement provides flexibility which benefits individual members of staff, students and the University as a whole. The use of the notional figure of 1,540 hours is not intended to imply a contractual or defined working period: it is used solely to act as a guide in ensuring a fair allocation of work through School workload models. It is also important that academic staff take and keep records of annual leave and sickness. Managers are expected to manage instances where staff are not taking annual leave allowances. Models should express the University's commitment to professional development, recognising that under the University of Bristol/Joint Trade Unions workload agreement, Heads of Departments and Schools must ensure that at least 70 hours per year (*pro-rata for part-time employees*) be allocated for professional development. They should also recognise the importance of academic citizenship through the hours assigned to those categories, as well as allowing reasonable time for trade union and public duties.

7. Buying Out Time

Where a member of staff has a partial buy-out of their time, buy out for research should not be secured by reducing research time for other staff.

8. Early Career Academics

The allocation of work to early career academics should acknowledge and take account of their need for more time to prepare for and deliver some of their allocated work. For example, staff new to teaching should have a work allocation with a greater emphasis on developmental activity during their University Probationary Period.

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