

# UNIVERSITY OF BRISTOL/JOINT TRADE UNIONS - WORKLOAD AGREEMENT (Updated April 2019)

## Agreement Scope – all staff graded J and above

This agreement builds upon an agreement reached by the Joint Negotiating Committee with the (then) AUT and agreed as University policy by Council in 2001. It has been updated to reflect the newly agreed Academic Workload Allocation Principles. It applies to all staff on Grades J and above and is subject to negotiations between the University and the Joint Trades Unions and for Academic Staff should be read and considered in conjunction with the Principles.

The University of Bristol, as a good employer, has a responsibility to ensure that it promotes healthy and congenial working conditions for all its staff. This responsibility derives from legislation but is also one to which the University is committed beyond mere conformance with the legislation. The workloads of staff can be a factor in inducing stress-related illness, with a consequent reduction in effectiveness of performance. The increase in work of other staff can lead to further overload and an expanding cycle of increasing stress can result. Similarly, any lack of clarity over the allocation of duties can give rise to stress and a perceived disparity in workload can be a source of complaint and grievance. The allocation and control of workloads and the monitoring of the effect is the responsibility of Heads of School and Divisions. It is important that each School and Division has in place suitable and appropriate procedures for allocating duties and the University Principles and this Agreement set out good practices which should be followed.

### 1. Preamble

The central purpose of this agreement is to enable the University and staff on grades J and above to achieve the following objectives which are in line with the University's Strategic Aims and specifically the Staff Mental Health and Wellbeing Strategy:

- a) to maintain and enhance the quality of the work carried out and the services delivered by the University and its staff;*
- b) to preserve, in so far as this is possible, the flexibility of the contractual framework and the professional autonomy of staff on these grades;*
- c) to ensure that members of staff on these grades are able to observe their contractual requirements, pursue their careers and undertake their day to day duties without unfair and unreasonable requirements being placed on them in relation to those duties, and with sufficient time to enjoy a personal life;*
- d) to protect and enhance the collegial structures of the University;*
- e) to ensure that the University as employer complies with its legal obligations and operates within the spirit of the Working Time Regulations (see Section 2).*

## **2. Working Time Regulations**

2.1. The Working Time Regulations 1998 (as amended) cover five main areas:

- minimum daily and weekly rest periods
- rest breaks
- paid annual holiday
- limits on the average number of hours which can be worked in one week
- restrictions on hours worked at night.

2.2. The University and the Joint Trade Unions accept that the Regulations provide minimum standards of employment and that good employers may improve on these minimum standards. They also agree that, in circumstances where the precise monitoring of working time is difficult, the spirit of the Regulations will nevertheless apply.

## **3. Principles**

3.1. The University accepts and acknowledges that staff on grades J and above have the right to:

- i) reasonable workloads;
- ii) a fair and transparent distribution of work within the University between departments and colleagues;
- iii) contain employer driven work within socially acceptable working hours;
- iv) regular daily, weekly and annual breaks from work;
- v) challenge unfair or unreasonable distribution or volume of work;
- vi) enjoy other rights as specified in contractual terms and conditions and in other agreements without pressure to rescind or restrict these rights.

3.2. Fundamental to this agreement are three entitlements applying to all staff:

- i) That workloads will continue to be managed in an open, fair and equitable way at the divisional/school level and that it is recognised that staff are able to challenge unfair and/or unreasonable distribution of workload.
- ii) That workloads will be such that contractual duties can normally be completed within an acceptable number of hours.
- iii) Staff are entitled to a break of a minimum of 30 minutes in the middle of each working day and should take a one-hour break wherever possible.

## **4. Managing Workload**

4.1. Excessive workload at School/departmental level can come from two sources:

- i) demands placed on the School/department to absorb increased levels of activity;
- ii) unfair or unreasonable distribution of work within the School or department.

This agreement provides for a mechanism to control and manage the total workload placed on a unit and to ensure fair distribution of work between Schools, departments and members of departments.

4.2. Each School/department will, therefore, establish agreed and open procedures in order to consider the overall allocation of work which can reasonably be managed within the resources available and without threat to the contractual rights and entitlements of members of staff. Where a School/department believes it needs to challenge its overall allocation of work, in the first instance, it may refer the matter to the relevant Dean or Divisional Head.

4.3. Each School/department shall establish a workable and transparent mechanism for distributing work fairly between staff members. The agreed distribution of work between staff will be made available to all staff in the School/department and for Academic Staff work will be allocated in line with the University's agreed Academic Workload Allocation Principles.

## **5. Models of Application**

This agreement acknowledges that staff on grades J and above are autonomous professionals. The University does not, therefore, normally insist that staff have to account routinely for their movements or be present at a particular place of work where this is not necessary. However, such staff have an obligation to deliver acceptable performance which includes being available for consultation by colleagues and students.

### **5.1 Academic staff (Pathways 1, 2 and 3)**

a) The undergraduate teaching and examining year is determined by Senate and Council. Academic Staff with undergraduate teaching responsibilities are expected to be available for attendance at the University during the undergraduate teaching terms except where alternative arrangements are agreed. This includes being available for student consultation within departmental tutorial guidelines. Academic staff who have agreed to teach on other courses outside term time will be expected to be available for scheduled duties and student consultation while those courses are running.

b) The normal working time during which teaching, marking, student related and administrative duties are carried out is Monday to Friday. Duties outside these days will be by agreement with the individual.

c) Academic staff with undergraduate teaching responsibilities will not, without the Head of School's agreement, take annual leave during term time. Academic staff who have agreed to teach other courses outside term time will not take annual leave during the period of the courses on which they teach. All absences (including sickness) from the University during such teaching periods should be notified to the School through the agreed procedures. All absences of more than three consecutive normal working days in any one week must be with the agreement of the Head of School.

d) In accordance with 3.2 (i) and 4.3, Heads of School will establish a workload allocation system that follows the principles agreed by the University and the Joint Trade Unions.

e) In any model, the overarching principle should be an equitable and agreed distribution of work among the members of the department taking into account a fair distribution of more or less popular tasks.

f) If agreement cannot be reached on allocated workloads, then a local mechanism for appeal against perceived excessive or unfair loads should be in place and known to all staff. Appeals about workload can be raised either by individuals or by a group of staff.

Normally any academic workload appeals should be raised in the first instance with the Head of School for local resolution. However, if it is not possible to resolve the matter locally, the case will be referred for resolution to the Dean of Faculty. The Dean and the Faculty Head of HR Business Partnering will review the case with a Trade Union officer and then seek to arrange to meet with the staff member(s) who can be accompanied by their Trade Union representative.

The Dean will encourage a consensus method of working and seek to reach an agreed solution. Where an agreed solution cannot be reached, the grievance procedure is available

g) Heads of School will aim to enable each member of the academic staff on Pathway 1 & 3 to achieve periods totalling ten weeks per year, not including annual leave, uninterrupted as far as is reasonably possible by scheduled activities, to be set aside for research and/or scholarship. Where requested by a member of staff, and if operationally possible, these ten weeks can be agreed as a single period and will be pro-rata for part time staff.

h) Heads of School will aim to enable at least 70 hours per year to be used for professional development (pro-rata for part-time staff).

i) Heads of School should also aim to enable time to undertake consultancy in accordance with University Regulations on outside work and the University Consultancy guidelines.

j) In the case of Pathway 2 staff working on externally funded research projects, providing satisfactory progress is being achieved by the member of staff there will be an allocation of time agreed by the grant holder in consultation with the Head of School, during which the employee may pursue personal research.

## 5.2 Other staff on Grades J and above

a) Workload will be managed in such a way as to ensure that adequate time is available to enable staff to broaden their range of experience in different areas of activity and for professional development and to ensure that these core activities are not consigned to evenings and weekends.

b) Except where other agreements are in operation, the normal working time during which duties are carried out are Monday to Friday. It is recognised that student and operational support takes place over 7 days per week and therefore, some staff may work shifts or rotas to meet the needs of student and/or operational services and this may include weekends, closure days and bank holidays.

c) Managers will aim to enable at least 10 days per year (pro-rata for part-time staff) to be used for the purposes of professional development, to be taken in consultation with the Head of Division, School or Faculty Manager.

## 6. Other Practical Considerations for Academic Workload Allocation

6.1 Each Head of School should produce an operational plan outlining the duties to be allocated to each member of staff, taking account of the absolute and relative size of each staff member's

workload. Where staff are part-time, care must be taken to ensure they do not carry a proportionately higher workload.

6.2 Such plans should normally be presented to a School or departmental meeting well before the start of the academic year for information and discussion. The plan should include means for monitoring the overall level of workloads. In producing the plan, Heads of School should bear in mind the need to respond to unforeseen circumstances such as sickness.

6.3 In all Schools there are popular and unpopular tasks. Heads of School should ensure that as far as possible tasks are shared equitably among staff.

6.4 Heads of School should help ensure that timetables are devised to ensure that no member of staff should be required to teach more than two consecutive fifty minute lectures or more than four hours in a practical session All staff should take a mid-day break for refreshment, fresh air and/or exercise.

6.5 Every attempt will be made to keep full time undergraduate teaching within 9.00 - 13.00 and 14.00 - 18.00 on Monday, Tuesday, Thursday and Friday, and 9.00 - 13.00 on Wednesday, with the 17.00 to 18.00 period used only as necessary to deliver teaching commitments.

6.6 Heads of School should consider that all teaching staff who have a contractual obligation to undertake research are eligible to apply for study leave. Senate requires each School to have a policy on study leave which should be made available to appropriate staff.

6.7 Heads of School are reminded of the legal requirement to allow reasonable time off for trade union duties and the University's agreement to allow reasonable time off for public duties.