

Academic Workload Planning Framework

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Policy control

Approved by	VCEG	
Contact/s	DVC(A)	
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1. Purpose

The University of Bedfordshire framework for planning academic workload is intended to provide an outline structure and a series of principles that will enable all academic staff to contribute equally and optimally to the sustainability and success of the institution, and ensure that managers are able to plan for the contribution of their departments and support the contribution of their staff, on the basis of an equitable, transparent and consistent approach to the allocation of duties.

To be effective, this framework must be

- Supported by clear and frequent communication between Heads of Department and academic staff about any changes that impact on individual workplans;
- Flexible enough to deal with change and the development of both the universities and its staff members;
- Robust enough to support staff contributions in a time of changing and increasing demands on the income generating activities of universities;
- Comprehensive enough to ensure that different activities are valued appropriately.

It is also the case that the operation of comprehensive workload planning provides an alternative to the time allocation survey submissions previously required throughout the year.

Core principles

- Academic contracts and role profiles define the range of contributions expected of academic staff to the sustainability and development of the University
- Within this, annual staff review provides regular opportunities for discussion of individual objectives and plans
- On the basis of all of the above, workloads agreed between Heads of Department and academic staff
- Individual factors such as career stage, contribution to periodic events (e.g. preparations for audit, PSRB review and REF) and a range of individual circumstances recognized by University policy, will also be relevant to the determination of individual contributions.

2. Scope

The framework integrates with:

- The University strategic plan, and its supporting plans for areas of activity and groups
- The planning, management and evaluation of staff contribution and development through the annual staff review process
- The academic role profiles that detail the full range of activities that can be expected to staff at particular grades;
- Academic contracts that specify the formal obligations of the University and its staff.

The working year

Full-time academic staff are contracted for the full year, and are expected to work the hours necessary and reasonable to complete their roles. Specific parameters used for the purposes of calculation should not be taken to imply that in any week work extending beyond that total is in excess of contract, or that work in any one week must be calculated to reach that total.

The total number of available hours is calculated pro-rata for part-time staff and staff on contracts of other than one year's duration.

The total available working time on which this model is based is as follows

Category	Calculation	Hours
Total annual hours	52.14 weeks x 35 hours	1825
Annual leave	35 days	245
Public, Statutory days	8 days	56
University Closure Days	5 days	35
Total hours for workload plan		1489

The total annual hours figure is based on the calculation used for calculating part-time contracts and does not include lunchtimes. The total available time includes activities categorized below as categories A, B and C. This figure is used for modeling purposes only and is neither a minimum nor a maximum.

People who teach during an evening should not be obliged to teach within 16 hours of the end of the previous evening's teaching. People must not teach the morning, afternoon and evening sessions on the same day unless through choice and to meet specific requirements. There must be an absolute limit on the number of teaching hours per day of 6 hours

Where academic staff undertake additional blocks of work at weekends, not included in their workload planning at the start of the academic year, it is reasonable for the staff member's Head of Department to ensure that an equivalent block of time is identified to replace the unanticipated commitment.

Workload planning and scheduling

It is important to keep in mind the distinction between overall workload planning, and work scheduling. For example, in allocating 2.5 hours for one hour of delivery (initial delivery) of a contact session (more in certain circumstances), it is not assumed that the 1.5 hours of non-delivery time allocated to a one-hour session is used within the week of delivery.

University teaching is informed by current knowledge and practice. Some of the time allocated for preparation is therefore likely to be spent in updating the knowledge and practice basis of the next delivery of a course/unit, and this may be undertaken within a block of non-teaching time rather than in-week. For example, in a unit with 24 hours of contact, the 36 non-contact hours allocated may be divided into half an hour for each of the twelve teaching weeks in a semester, and 24 hours spent in a period prior to delivery in updating the content and the reading list.

3. Policy

In order to progress the University's strategic development, and the contribution of its staff members to a sustainable future, it is important that the planning of individual staff workloads is informed and preceded by Faculty and Department planning of objectives and targets, in the context of the University strategic plan.

Similarly, for each individual member of staff, consideration of the detail of workload planning, must be informed by an initial estimation of the balance of activities to be undertaken by that individual, in the context of their formal contract and relevant role profile, and the University's annual staff review.

Contribution to research and scholarly outputs, income generation, academic development

and management responsibilities, and agreed career development activities should be identified in advance of the allocation of teaching, since these areas play a significant role in aligning individual contribution with grade and contract.

The University defines research as original work of investigative and/or creative value and impact that is communicated beyond the University, including to sponsoring organizations through consultancy. The University defines scholarly activity as the production of knowledge for public dissemination through, for example, books, book chapters, unpublished conference papers, and creative and original work in any media produced for external dissemination.

The following activities (identified below as category A activities), in particular, should be considered at an early stage in the academic workload planning process:

- Determination of the use of the time specified for research and scholarly activity
- The allocation of academic management, Department, Faculty and University responsibilities;
- Agreement on staff development opportunities⁷

PhD study is a staff development and not research activity. Research activity includes the production of outputs recognized by the research strategy, and therefore the production of outputs that may form part of a PhD by publication submission do constitute research activity. The University's policy on staff PGR registration relates to this activity.

The allocation of teaching, and teaching-related activities can then be undertaken, on the basis of the following:

1. Normal scheduled teaching activities should not exceed 18 hours in any week, or a total of 550 hours in the year, excluding subjects where the nature of the curriculum and teaching style make it inappropriate (eg Teacher Education, Art, Design, Performing Arts, Music).
2. The teaching year should not normally exceed 38 weeks, of which 2 are allocated to teaching administration.
3. No more than 14 weeks of consecutive teaching

4. Forms/Instructions

It is the responsibility of the Head of Department to ensure that the contributions and workloads of individual staff members are reasonable and equitable, and support the contribution of staff to University sustainability and development in line with grade and contract. In their exercise of this responsibility, Heads of Department will need to liaise with research institute directors, and faculty deans, to ensure that a comprehensive picture of the contribution of each staff member is available to them. Where (as, for example, in the case of some Principal Lecturer responsibilities) contributions extend beyond departmental reach, these should be agreed within the Faculty Executive at an early stage in the workload planning process.

Heads of Department should consult their department (at departmental or subject level, as appropriate) on the workplan for the department in the forthcoming year (i.e. priorities, objectives and projects). Individual meetings with staff members will follow, to draft plans for contribution to departmental projects and activities. A guidance document is available for use with the online work planning system. Workload planning should be undertaken using the online system for all full-time and fractional contract staff whose contract starts before November 1 in the planning year. For staff starting on or after that date, workload planning should be undertaken, but the online system may not be appropriate.

The Head of Department will approve, reject or request further discussion of, individual plans

within two weeks of their submission. Plans should be rejected or identified as requiring discussion, rather than remaining open and unresponded.

Work plans are now locked separately from approval, using a 'lock' button on the top right-hand corner of the screen.

An Excel version of the approved workplan will be available for update during the academic year and review at the end of that year as part of preparation for the following year's plan.

Once individual plans are completed, the Head of Department should discuss the outline allocations with the Department as a whole. Individual plans should be available for consultation by members of staff. The Faculty Executive Dean will then review departmental contributions and workload plans to confirm that all faculty and extra-faculty requirements have been incorporated and that parity exists across Departments.

The workload planning process will form an agenda item on an academic JNC each year. This review completes the workload allocation process. However:

- Because of the timing of workload planning and annual staff review, changes to workload plans, as an outcome of review, may need to be accommodated and agreed between a Head of Department and an individual staff member;
- A cross-faculty review will be conducted annually, to monitor parity across faculties, and the outcomes of this review will be reported by Faculty Deans to Faculty Executive Groups.

Finalizing individual work plans

Note: it is important to be clear about the role in which an activity is undertaken. E.g. There are duties that Course Coordinators and Link Coordinators may perform that are not included here because they relate to their general academic work and are accounted for in the workload plan at another stage.

It is not the intended purpose of the workload planning system to prescribe workloads, and in a number of areas, it is possible and entirely legitimate to include activities in one of two or more categories. Departmental consistency is the priority in such cases.

Stage one: category A activities

In order to ensure that strategic priorities are not overlooked, Heads of Department should discuss with individuals the following categories of activities

- Research and scholarship
- Academic management roles and responsibilities
- Consultancy and enterprise activities
- Departmental, Faculty and University-wide roles
- Staff development (including PTS, PGR study and study for other formal qualifications)
- External engagement undertaken on behalf of the University
- Other strategic priorities (eg new course development, the review and development of existing courses and units)

None of the lists in this framework should be considered to exclude activities not specified explicitly within this document. Additional activities identified in the process of work planning should be categorized appropriately and treated accordingly

The allocation of research time must only be for work within the University's definition of research (above), and in relation to specified objectives. The funding source for time allocated for research should be specified, to fulfill the University's obligations to report time allocation within HEFCE's TRAC system.

Early consideration of individual objectives within the University's annual staff review process should inform this stage of the processes.

From this discussion will emerge a draft overview of individual plans (i.e. an approximate % of time available for work planning to be allocated to stage one activities.

Stage two: Category B activities

At stage two, the % of individual time available for work planning to be allocated to teaching and teaching-related activities, should be considered. At this stage, a Head of Department may delegate the detailed planning task to a senior academic member of their department. In this category of duties, there are a range of teaching-related roles and activities for some of which the University cannot currently provide a specific time allocation, because of varied practice across faculties and departments.(7) These are listed below, and should be agreed before category C activities are determined.

Although it is not possible to allocate these uniformly, it is important that the specification of the duties is transparent and appropriate.

PGR supervision	Specified hours of support, according to policy on PGR supervisory workload
PGT dissertation supervision	As determined by departmental specification of dissertation and student support levels provided in UIF, with time per student/group allocated for marking and administration as for Category C activities.
UG dissertation supervision	As determined by departmental specification of
	dissertation and student support levels identified in UIF, with one additional hour per student/group allocated as for category C activities.
Placement visits	Meeting time, plus estimated travel.
Link tutor responsibilities	As specified
Partnership Unit Co-ordination	Where the addition of partner delivery makes a substantial difference in a unit coordinator's workload beyond items listed separately elsewhere
Coordination of unit tutor contributions	Where a unit coordinator is responsible for the coordination of a group of staff delivering a single unit rather than delivering it solo
Staff mentoring and induction	Where a staff member is contributing substantially to the mentoring of colleagues and the induction of new and HPL staff in-year.
Partner delivery	Where delivery is undertaken at a partner institution (including travel), with appropriate reduction in teaching delivery during absence

List of responsibilities in course coordination and partnership delivery (definitions of 'cohort' are included in the online system) are listed within the system as specific roles, but can be shared between individuals.

Where additional time is allocated for additional student numbers, the added time should be claimed only when the total additional number is reached

Stage three: Category C activities

At this stage, specified time allocations associated with teaching and teaching-related activity should be determined.

The following time allocations are proposed to ensure that for activities amenable to calculation on this basis, parity of expectation and contribution is maintained across departments and faculties. It does not represent total or primary workload.

(A) Unit-based activities

	and preparation.
Seminar, tutorial, practical hours	2.5 hours for the first hour/session, and 1 hour for additional hours/repeated sessions within the same academic year, including incremental syllabus development and preparation.
Lecture hour, new unit	4 hours for the first delivery, and 1 hour for repeated sessions within the same academic year. Note: this additional allocation is only for significant non-incremental unit change. Routine development is covered in the allocation of preparation time
Lecture hour, member of staff within first year of appointment at Grade 7	4 hours for the first delivery and 1 hour for repeated sessions within the same academic year.
Seminar, tutorial, practical hours, new unit	4 hours for the first session, and 1 hour for additional hours/repeated sessions within the same academic year.
Seminar, tutorial, practical hours, member of staff within first year of appointment at Grade 7.	4 hours for the first session, and 1 hour for additional hours/repeated sessions within the same academic year.
Studio/lab hours	Hour for hour where these require no substantial preparation, including assessment of practical and presentation tasks graded in real time
Marking and providing individual written feedback (all levels)	20 mins per 1500 words/one hour test/exam answer.
Second-marking (no feedback required to student)	15 mins per 1500 words/one hour test/exam answer.
Scheduled student support (face to face assessment feedback outside class, and additional meetings as required) Where this is	45 mins per student per 30 credit unit (30 mins per 15 credit unit).
Teaching administration	15 hours per unit, for each operation of that unit (i.e. per semester – any additional hours required to support multi-site delivery of a single operation of a unit should be determined separately and included in an 'other' category).

(b) Non-unit activities

Personal academic tutoring	1 hour per tutee
Invigilation	Estimated total
Committee membership	Scheduled hours
Inter-campus travel	Estimated total

5. Links/Dependencies

This policy should be read and its use considered with reference to:

- The online academic workload planning tool and associated guide
- staff review policy and process
- The University's role profiles and grading structure
- Quality Handbook information on key responsibilities of specified teaching roles