Workload Planning
A guide to emerging practice

The workload planning group said:

The key benefits to the Institution should be identified up front. These benefits should be articulated to the relevant stakeholders to assist their buy in. Matching benefits to users (academics, back office, SMT) will help.

Senior management buy in was identified by the working group as crucial to the successful implementation of a new workload planning model.

Designing an academic workload model is relatively straightforward. Implementation is where the hard work comes in.

Where the sector is now
- Only a handful of Institutions have University wide workload models incorporating teaching and research
- However there are a number of Institutions actively looking at implementing University wide workload models in order to ensure equity of workloads within the institution

The benefits:

1. Ensure equitable workload amongst staff
2. Support reliable information on where staff time is spent and hence the effectiveness and efficiency of a department's / institution's activities
3. Better support accurate, reliable budgeting, costing and forecasting data.
4. Benchmark the cost and value for money of individual courses and/ or academic departments
5. Facilitate consistency in contact hours
6. Support health and safety of staff – ensuring that individuals with very high work loads are identified and the potential impact appropriately managed
7. Provide reliable, robust TRAC data which becomes an integral part of an Institution's management information, rather than through the standalone Time Allocation process
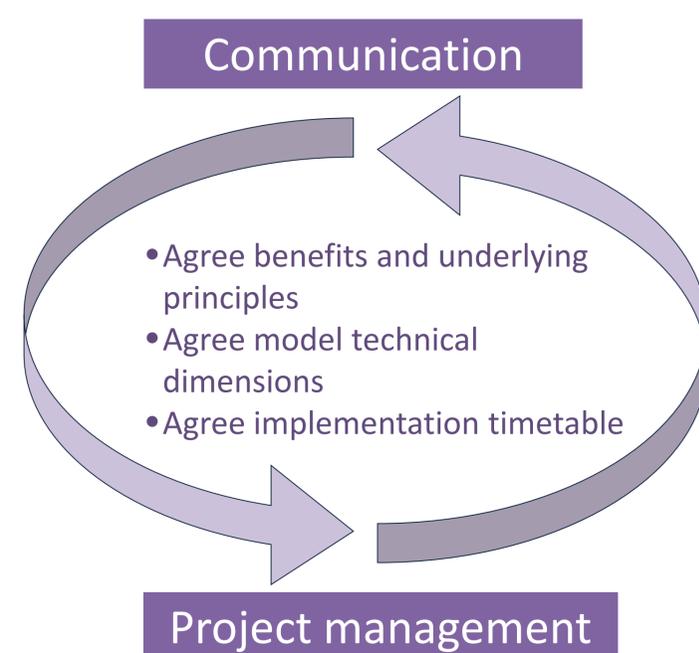
The barriers:

1. Perceived challenge to academic freedom / culture does not support management oversight
2. Department / faculty desire for autonomy
3. Units based measure of activity does not capture quality
4. Lack of senior management implementation support
5. Lack of flexibility in approach "but we're different"
6. Difficulty in capturing research activities

Equity

+

Transparency

+

Consultation

Communication

- Agree benefits and underlying principles
- Agree model technical dimensions
- Agree implementation timetable

Project management

A big thank you to all the institutions that participated in the project