ACADEMIC WORKLOAD MANAGEMENT POLICY AND PROCEDURE

PO-STA-10

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Purpose and Scope

The purpose of the Academic Workload Management is to establish a shared understanding of how an academic workload should be managed and allocated, and to support academic staff and Heads of School in consulting on the allocation of an academic workload on an annual basis.

The Academic Staff Work Planner is intended to be used for planning and managing individual workloads for permanent academic staff. The Work Planner encompasses the academic workload activities of teaching, administration and governance, research and scholarship and external activities.

As professionals, most academic staff are employed on the basis of an annual salary and this Work Planner takes that annual context into account.

The Modern Award provides for 38 hours work per week, averaged over 48 weeks i.e., 1824 total accumulated hours distributed across the year (excluding 4 week annual leave).

Under normal circumstances, academic teaching staff are expected to spend approximately: 60% of their workload on teaching, 20% on administration and governance, 15% on research and scholarship, and 5% on external activities (optional). In terms of actual hours this distribution equates to:

1. Teaching or Research Supervision= 1094 hours
2. Administration and Governance = 365 hours
3. Research and Scholarship = 274 hours
4. External Activities = 91 hours

Teaching equates to a minimum of 3 days on campus.

Excelsia College recognises that it is difficult to quantify precisely all aspects of academic work and this is not the purpose of the Work Planner. Rather, the Academic Staff Work Planner signals the College’s commitment to contemporary academic roles, and provides objectives, principles, broad definitions of academic work, normal workload allocations for academic work and a process to manage identified workload issues.

Objectives

- To ensure the total workload allocated to individual members of staff is reasonable, safe and equitable.
- To provide clarity to academic work and academic availability and aligns academic work and academic availability to the strategic priorities of the College.
- To achieve an appropriate balance between the needs of the College and each staff member’s academic level, expertise and experience

Definitions

For the purposes of determining the number of hours worked by an academic teacher [1], the following will apply:

- **A LECTURE**, being the main presentation of course material in a subject, will count as three hours’ work for each hour of delivery, and will include associated preparation, assessment and student consultation.
- **A TUTORIAL**, being a presentation to students in a unit or subject in which lectures are offered will count as three hours’ work for each hour of delivery and will include associated preparation, assessment and student consultation; and
- **A REPEAT OF A LECTURE OR TUTORIAL**, carried out within 28 days of the first delivery, will count as two hours’ work for each hour of delivery.

[1] Educational Services (Post-Secondary Education) Award 2010
Broad Definition of Academic Work

The following factors MAY be relevant when determining individual workloads:

- **TEACHING**
  1. teaching at different levels (undergraduate, post-grad, doctoral, short courses)
  2. differences in the degree of difficulty in preparation and delivery of teaching
  3. size of classes (student consultation, marking load and coordination with other staff involved)
  4. nature of the students in terms of the support or additional workload involved
  5. acknowledgement that inexperienced lecturers will usually require greater time for teaching preparation
  6. allocation of time, where the attainment of formal qualifications is a probationary requirement
  7. the number of different subjects to be taught
  8. the number of students taught in each class
  9. repeat-delivery of lectures and tutorials
  10. delivery of units using a range of technologies
  11. availability of technical support and training for flexible modes of delivery of teaching
  12. opportunities for staff to develop teaching expertise and other work skills.

- **HIGHER DEGREE BY RESEARCH SUPERVISION**
  13. Supervising a Research Project by a coursework Masters student
  14. Supervising a Research Thesis by a Masters research student
  15. Supervising a Research Thesis by a Doctoral research student

- **ADMINISTRATION AND GOVERNANCE**
  13. position with respect to administrative and governance responsibilities
  14. number of staff in school – tenured, fixed-term and casual
  15. level and experience of staff
  16. level of administrative support
  17. number of programs delivered

- **RESEARCH AND SCHOLARSHIP** (subject to alignment with Excelsia research and strategic priorities)
  18. demonstrated publication record
  19. research supervision experience and load

- **EXTERNAL ACTIVITIES**
  20. professional and community service position and networks

Responsibility

The following people have a responsibility in relation to this procedure:

- Academic Director
- Manager Human Resources
- Chief Executive
- Head of Schools

Procedure

This procedure suggests ways in which supervisors and professional staff can work together to actively manage workloads and working hours effectively and responsibly.

Effective workload management is the joint responsibility of supervisors and professional staff. This can be achieved through effective planning and prioritisation of tasks, appropriate resourcing, staff development and ensuring that the College's policies and relevant legislation are followed.

Most concerns about workloads will be able to be managed through day to day interaction between staff and their supervisors and with reference to this procedure.
1. **Workload Allocations for Academic Work**

The basis for calculation of the annualised academic workload is 38 hours per week times 50 weeks in a year where the College is Open. In any calendar year an academic staff member is entitled to the following to achieve work-life flexibility and to ensure the staff member’s health and wellbeing through taking a break from work to recreate:

- Annual Leave: 20 days (140 hours)
- 10 public holidays: 10 days (70 hours).

This results in a rounded figure of 1,824 hours of academic staff availability to be managed through work allocation in line with this Academic Staff Work Planner.

2. **Academic Staff Work Planner**

The Academic Staff Work Planner is the tool used to plan and manage academic staff workloads.

- At the beginning of each semester 1 and 2, the supervisor meets with each of their permanent academic staff to complete, review and finalise the Work Planner.
- The fields in grey are to be completed by the staff member with the weekly hours for each task and then discussed with the supervisor during the meeting.
- When it is a block of time only, just enter the hours in the TOTAL column in the formula.
- Once weekly working hours are entered in the Work Planner, total hours for the semester will be automatically calculated.
- Supervisor sends to agreed copy of Work Plan to the Manager Human Resources.
- The Manager Human Resources compiles all the Work Planner and meets with the Academic Director to review and determine if hours are reasonable.
  - In determining what reasonable hours of work are, the College will have regard to the following factors:
    - The total number of teaching and supervision hours;
    - The total number of teaching and/or required hours worked during a particular day or week;
    - The number of teaching and/or required hours worked without a break;
    - The length of a break between required hours of work;
    - Any requirement to undertake teaching before 8.00 am or after 9.00 pm or on College holidays;
    - Requirements to travel between campuses to undertake teaching or supervision;
    - The time-off between finishing and starting times of teaching sessions;
    - The number of days of the week during which teaching and/or required duties are scheduled;
    - Health and wellbeing issues;
    - The incidence of night work;
    - The academic staff member’s general workload; and
    - The academic staff member’s family needs and responsibilities.
- All approved Work Planner are sent to the supervisor for confirmation by the Manager Human Resources. Approved copy is also sent to the staff member by their supervisor.
- If the hours in the Work Planner are not reasonable, the Manager Human Resources, the Academic Director and the supervisor meet and discuss some strategies as specified in point 4 below Workload Management.
- The Work Planner is then modified with the actions to make the hours reasonable and the supervisor communicates the plan to the staff member.
- At end of Semester Work Planner is reviewed in conjunction with the teacher action plan.
3. **Supervisor’s Responsibilities**

It is part of the managerial role of supervisors of professional staff to take active measures to wherever possible consult with staff when planning, monitoring and adjusting workloads and working hours to ensure that staff work within the authorised policies and procedures referred to below.

Supervisors must determine and implement systems and procedures suited to their local needs.

Active management of workloads and working hours will also require supervisors to manage the availability of their staff by careful implementation of policies and procedures relating to leave.

For forms of planned leave, this will involve an emphasis on monitoring leave balances to avoid excessive accruals and scheduling leave to ensure optimum deployment of staff within recognised workload peaks and troughs.

For forms of unplanned leave, this will involve an emphasis on allocating tasks and priorities to staff affected by the absence of their colleagues. Wherever possible, affected staff should be consulted before tasks are allocated or re-allocated.

4. **Workload Management**

Supervisors also need to systematically review the allocation of tasks to staff. As a minimum this should be done annually at the beginning of each semester and reviewed when conducting a staff member’s performance review (which will include a review of position descriptions).

The annual performance review is an opportunity to look at the complete workload of the staff member being reviewed and to address any problems that may be emerging from either the supervisor’s or staff member’s perspective. It is also a time to jointly identify any particular staff development needs that may assist or improve the staff member’s ability to carry out the duties of the position successfully.

The constraints under which staff work make it imperative that supervisors plan:

- staff leave takings;
- the priority tasks to be achieved and the order in which they will be completed; and
- the current tasks which may have to be discontinued or substantially modified.

To ensure that staff are not required to work unreasonable hours to meet deadlines or to organise special events, supervisors must pay particular attention to the allocation of resources. At times it will be necessary to hire casual staff to assist with peak loads, or fixed-term contract staff for specific projects. Supervisors should clarify priorities with their supervisor, in situations where their current or available resources are unable to meet the expected demand.

5. **Practical Guidelines in Managing Workload**

By actively managing workloads in accordance with the policies and procedures referred to above in conjunction with these guidelines, supervisors and staff should minimise concerns regarding working arrangements and workloads.

The following practical guidance can help to ensure that there is a working environment that wherever possible benefits everyone:

**FOR THE SUPERVISOR**

- **Understand Your Staff Member’s Job.** Unless you understand the range and scope of the duties you expect staff to perform, it will be hard to assess and manage workloads. Ensure that your staff have an up to date PD which clearly reflects the job that they do. If the PD is out of date, it is time to review it - together. The annual Performance Review meeting offers the perfect opportunity, but if that is not due for some time an earlier review of the PD may be appropriate. At the same time you may be able to re-design the position and adjust workloads.
• **Discuss Expectations.** Ensure that your staff know exactly what is expected of them when performing their duties including, where appropriate, the priority in which tasks are required to be completed. This should be done with their input and should include mutually agreed goals. Weekly meetings with staff to discuss tasks will help all involved understand what is required to be done.

• **Discuss Timeframes.** If you need to allocate additional duties to staff, discuss these duties with them and how they will impact on other existing duties. It may be that you will need to re-prioritise tasks, agree on new timeframes, delete tasks or re-allocate jobs. It may be beneficial to trial any new arrangement and review the outcomes before making permanent changes.

• **Reporting Lines.** In the majority of circumstances, staff will only have one supervisor. If staff are being asked to perform tasks by more than one supervisor, for example as a result of a job-share arrangement, it may make the situation difficult for the staff member and lead to confusion and inefficiencies. It is desirable for all tasks to be channeled through the one supervisor wherever possible.

• **Staff Development.** Staff may need additional skills to cope with their duties or an increasing workload. Courses can be made available as part of Staff Development. However, additional staff development may not be the only solution to the effective management of workloads.

• **Recognise Staff.** Recognise staff who have made extra efforts. A simple thank you will go a long way.

• **Annualised Hours.** If you work in an area where there are busy periods and slow periods, you may (with the agreement of the staff involved) be able to introduce annualised hours, particularly for part-time staff. This means that standard hours of work may be varied on different weeks, depending on demand, while the staff member’s salary remains constant.

• **Multi-Skilling.** As a supervisor you should ensure that where possible, other staff have the required skills to take on the work of absent team members or when times are busy. Investment in staff development for the purpose of creating multi-skilled team members has benefits to both staff and the College. Staff development opportunities should be provided equitably amongst staff. Be mindful of the ability of the staff member to complete their own duties, as work can build up while they are covering duties associated with another staff member’s position. Such arrangements can cover short-term workload pressures, but longer term absences should be addressed by an appropriate temporary appointment.

• **Secondments.** If you have a particularly busy period, you may be able to organise additional staff via secondments. Secondments are temporary arrangements and should not be established on a long-term basis.

• **Avoid Loading Particular Staff.** It is easy to keep ‘loading up’ staff who you know will do a good job. Ensure that you take into account workloads and the equitable distribution of tasks amongst all staff.

• **Review Staffing Arrangements.** Periodically review existing staffing arrangements to ensure that staffing levels are sufficient to perform the organisational unit’s functions effectively and without excessive workloads. Consider employing additional staff as appropriate.

**FOR THE STAFF MEMBER**

The first step is to discuss your workload with your supervisor.

• **Be Specific.** Provide specific examples of your workload concerns. Rather than make general comments about your workload, give examples of occasions where you feel your workload has been excessive. Provide details of the volume and complexity of the duties you perform, and how long they take to complete. Outline any workflow concerns such as where other staff/organisational units have an impact on your ability to complete tasks efficiently.
• **Discuss Priorities.** Discuss the work you are expected to complete. Outline the way in which you prioritise tasks so that you can have a discussion with your supervisor and agree on priorities. Talk with your supervisor about what is urgent, routine or non-essential.

• **Provide Solutions.** Discuss any barriers or problems you encounter when completing your work. Sometimes supervisors are not aware of what the problems are. Bring any solutions or new ideas to help resolve issues to your supervisor’s attention.

• **Discuss Realistic Timeframes.** Discuss any timeframes imposed for getting work completed. If you feel the timeframes are unrealistic, it is best to talk about this before things get behind. For complex tasks, break these down into individual jobs and discuss realistic timeframes. This type of project plan will demonstrate what needs to be done and the timeframes allocated. It will help you keep on track and clearly demonstrate the complexity of tasks.

• **Discuss Any Development Needs.** If you are required to take on new responsibilities, you should have the skills and competencies required. For example, if a new aspect of your position requires you to perform complex calculations and you do not know how to use a spreadsheet, this will result in both frustration and inefficiency. If you need training assistance, suggest this to your supervisor and explain how it will help you better perform your duties.

• **Agree on an Action Plan.** During the discussion with your supervisor, agree on some possible solutions and a time frame to implement them. Also set up a time for the two of you to meet again to discuss progress towards better managing your workload.

**OTHER OPTIONS**

• **Job Re-design.** Sometimes jobs grow and it is not feasible for one person to continue to manage all aspects of the position. If the job has changed it is important that an up-to-date PD is prepared. Listing each accountability and responsibility will assist your supervisor in understanding the job and its demands. Once this is completed, it may be possible to re-design the job to assist in managing your workload.

• **Teamwork.** If the staff member works as part of a team they may be able to ask other team members to assist them during busy periods. The staff member or the supervisor may also wish to consider discussing any general workload concerns in a team meeting.

• **Staff Grievance Procedure.** Should a staff member have concerns about the workload that has been assigned to them by their supervisor or manager, the staff member may raise the matter through Staff Grievance Procedure.

**References and Related Documents**

[http://ppl.app.uq.edu.au/content/5.55.01-management-professional-staff-workloads](http://ppl.app.uq.edu.au/content/5.55.01-management-professional-staff-workloads)

Educational Services (Post-Secondary Education) Award 2010


Staff Grievance Policy and Procedure

Performance Review and Personal Development Planning Procedure

Personal Development Plan